2025-2026 ORANGE CROP FORECAST UPDATE FOR THE SÃO PAULO AND WEST-SOUTHWEST MINAS GERAIS CITRUS BELT
DECEMBER/2025

Forecast update (variation in the September forecast):

December, 12 2025

Total orange crop production forecast: 294.81 million boxes (3.9% decrease)
Hamlin, Westin and Rubi: 46.23 million boxes (1.9% decrease)
Other early season: 17.65 million boxes (2.0% decrease)
Pera: 87.65 million boxes (1.9% decrease)
Valencia and Folha Murcha: 106.23 million boxes (5.8% decrease)
Natal: 37.05 million boxes (6.0% decrease)

Publication Schedule 2025-2026
3rd Crop forecast update: February 10, 2026
Final crop forecast: April 10, 2026

Table 1 – Orange crop forecast update by sector and variety group – citrus belt

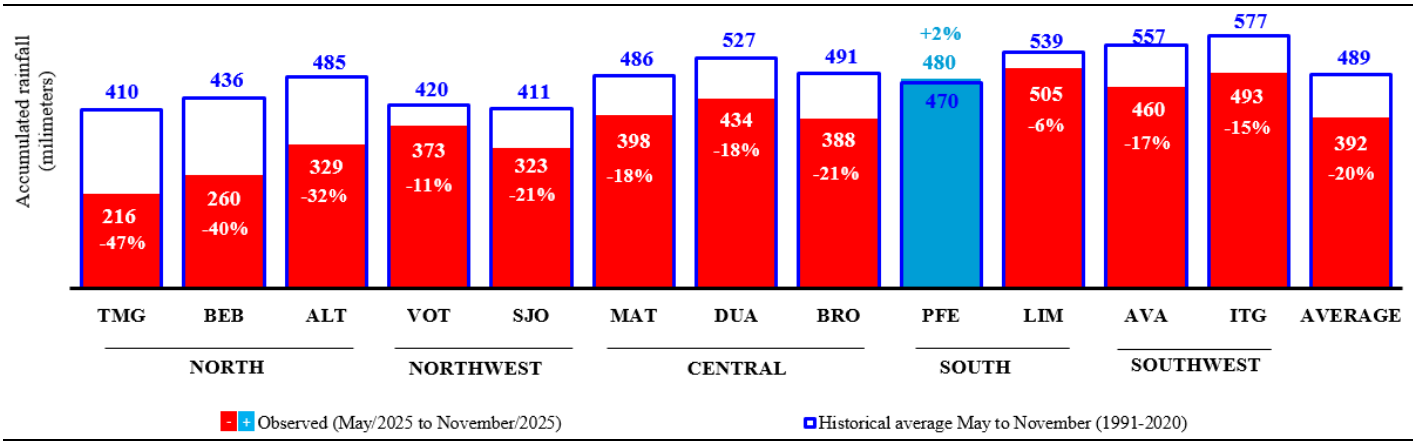
Month	Forecast components				Crop forecast 2025-2026			Crop forecast update 2025-2026		
	September/2025 and December/2025 (strike-through values were presented in September, to their left are their respective values updated in December)				September/2025			December/2025		
Sector and variety group	Bearing trees	Fruit per tree at stripping	Fruit estimated per box	Estimated drop rate	Per tree	Per hectare	Total	Per tree	Per hectare	Total
	(1,000 trees)	(number)	(number)	(percentage)	(boxes/ tree)	(boxes/ hectare)	(1,000,000 boxes)	(boxes/ tree)	(boxes/ hectare)	(1,000,000 boxes)
CITRUS BELT										
Hamlin, Westin and Rubi....	27,322.37	692	305	16.9 ~~15.0~~	1.73	811	47.14	1.69	795	46.23
Other early.....	12,477.78	526	272	18.5 ~~16.6~~	1.44	786	18.00	1.41	771	17.65
Pera….....	67,129.82	498	267 ~~261~~	22.0	1.33	692	89.38	1.31	679	87.65
Valencia and Folha Murcha	56,767.51	695	248 ~~235~~	25.6 ~~24.9~~	1.99	987	112.79	1.87	929	106.23
Natal.....	19,013.25	753	248 ~~242~~	28.5 ~~25.5~~	2.07	1,045	39.43	1.95	982	37.05
Total.....	**182,710.73**	**617**	**265** ~~**258**~~	**23.0** ~~**22.0**~~	**1.68**	**847**	**306.74**	**1.61**	**814**	**294.81**
NORTH SECTOR										
Hamlin, Westin and Rubi....	6,695.54	642	307 ~~301~~	16.0 ~~12.2~~	1.67	727	11.17	1.58	687	10.55
Other early.....	3,098.88	394	284 ~~265~~	11.0 ~~10.0~~	1.19	651	3.70	1.11	603	3.43
Pera….....	15,002.13	466	247 ~~251~~	26.9 ~~21.6~~	1.29	692	19.37	1.23	660	18.48
Valencia and Folha Murcha	13,818.66	747	240 ~~263~~	14.0 ~~12.4~~	2.20	1,042	30.39	2.39	1,135	33.08
Natal.....	3,254.20	712	232 ~~203~~	20.1 ~~21.2~~	2.45	1,089	7.96	2.19	976	7.13
Subtotal.....	**41,869.41**	**601**	**255** ~~**261**~~	**18.3** ~~**15.6**~~	**1.73**	**849**	**72.59**	**1.74**	**850**	**72.67**
NORTHWEST SECTOR										
Hamlin, Westin and Rubi....	1,610.87	570	279 ~~263~~	7.7 ~~7.1~~	1.79	733	2.89	1.69	690	2.72
Other early.....	2,356.53	435	242 ~~239~~	18.7 ~~15.5~~	1.37	803	3.24	1.31	763	3.08
Pera….....	8,272.51	335	233 ~~221~~	16.4 ~~15.8~~	1.13	498	9.36	1.07	472	8.88
Valencia and Folha Murcha	2,666.32	536	246 ~~193~~	20.0 ~~17.8~~	2.02	917	5.38	1.56	709	4.16
Natal.....	1,439.05	418	214 ~~216~~	12.0 ~~9.7~~	1.55	852	2.23	1.54	844	2.21
Subtotal.....	**16,345.28**	**413**	**242** ~~**223**~~	**15.9** ~~**14.5**~~	**1.41**	**655**	**23.10**	**1.29**	**597**	**21.05**
CENTRAL SECTOR										
Hamlin, Westin and Rubi....	7,433.62	682	311 ~~313~~	22.1 ~~20.2~~	1.55	785	11.52	1.53	776	11.39
Other early.....	4,346.47	617	281 ~~287~~	20.0 ~~18.8~~	1.56	844	6.77	1.57	852	6.84
Pera….....	19,386.95	495	263 ~~247~~	17.6 ~~20.0~~	1.42	775	27.57	1.38	754	26.85
Valencia and Folha Murcha	16,393.87	605	245 ~~198~~	28.6 ~~21.7~~	2.11	1,092	34.67	1.58	814	25.85
Natal.....	5,114.10	691	264 ~~241~~	28.9 ~~32.8~~	1.71	874	8.72	1.66	852	8.50
Subtotal.....	**52,675.01**	**585**	**267** ~~**245**~~	**23.4** ~~**21.9**~~	**1.69**	**892**	**89.25**	**1.51**	**794**	**79.43**
SOUTH SECTOR										
Hamlin, Westin and Rubi....	5,039.47	638	312 ~~316~~	19.3 ~~17.8~~	1.48	724	7.45	1.48	724	7.46
Other early.....	494.31	421	304 ~~292~~	17.1 ~~17.6~~	1.05	522	0.52	1.03	512	0.51
Pera….....	12,493.76	506	296 ~~273~~	24.2 ~~29.8~~	1.15	614	14.42	1.16	616	14.46
Valencia and Folha Murcha	9,776.21	678	269 ~~249~~	36.0 ~~40.3~~	1.44	679	14.05	1.44	682	14.11
Natal.....	3,421.75	660	246 ~~253~~	35.6 ~~45.9~~	1.25	718	4.27	1.54	888	5.28
Subtotal.....	**31,225.50**	**597**	**283** ~~**270**~~	**28.9** ~~**33.3**~~	**1.30**	**663**	**40.71**	**1.34**	**681**	**41.82**
SOUTHWEST SECTOR										
Hamlin, Westin and Rubi....	6,542.87	825	299 ~~300~~	12.8 ~~12.0~~	2.16	1,016	14.11	2.16	1,016	14.11
Other early.....	2,181.59	654	262 ~~275~~	22.2 ~~18.7~~	1.73	908	3.77	1.74	913	3.79
Pera….....	11,974.47	647	280 ~~292~~	23.2 ~~20.7~~	1.56	805	18.66	1.59	819	18.98
Valencia and Folha Murcha	14,112.45	790	247 ~~240~~	28.1 ~~31.1~~	2.01	1,054	28.30	2.06	1,081	29.03
Natal.....	5,784.15	968	249 ~~256~~	30.6 ~~16.1~~	2.81	1,369	16.25	2.41	1,174	13.93
Subtotal.....	**40,595.53**	**771**	**265** ~~**268**~~	**24.4** ~~**22.0**~~	**2.00**	**1,014**	**81.09**	**1.97**	**999**	**79.84**

Total orange production[1] is updated at 294.81 million boxes

The second update of the 2025-2026 orange crop forecast for the São Paulo and West-Southwest Minas Gerais citrus belt, published on December 10, 2025, by Fundecitrus, carried out in cooperation with professor (retired) from FCAV/Unesp[2], is 294.81 million boxes of 40.8 kg (90-pound box). In comparison to the May forecast, the crop season is expected to yield 19.79 million fewer boxes, a decline of 6.3%. Compared to the last forecast released in September, which projected 306.74 million boxes, the new estimate indicates a 3.9% reduction, corresponding to a decrease of 11.9 million boxes. This downward trend is due to the estimated smaller average size of oranges and a higher rate of premature fruit drop. It is also estimated that approximately 25.83 million boxes will be harvested in the Triângulo Mineiro region.

When the last updated forecast was disclosed in September, the harvest pace indicated that a significant portion of the Pera variety crop would be harvested after the more intense rains expected during spring. However, rainfall in September averaged only 20 mm in the citrus belt, 70% below the historical average, and the rainfall in October only intensified midway through the month, according to Climatempo Meteorologia data. This scenario extended the drought observed in the previous months and adversely affected the development of fruits harvested during this period.

From May to November 2025, the average accumulated rainfall in the citrus belt was 392 millimeters, which corresponds to a 20% deficit in relation to the historical average (1991-2020). Only the Porto Ferreira region recorded a rainfall volume above the benchmark. All other regions reported values below the historical average. The Northern region saw the most significant reductions, ranging from 32% to 47%. As shown in Graph 1, the regions of São José do Rio Preto and Brotas registered downward levels of 21%, followed by Matão and Duartina (18%), Avaré (17%), Itapetininga (15%), Votuporanga (11%), and Limeira (6%).



Graph 1 – Accumulated rainfall from May to November (2025) in the Citrus Belt regions
Source: Fundecitrus, based on data from Climatempo Meteorologia

By mid-November, around 65% of the overall crop had been harvested. The harvest of the early varieties Hamlin, Westin, and Ruby reached 99%, whereas 95% was registered for other early varieties. In the case of the Pera variety, the harvested percentage totaled 85%, but only 17% had been harvested by mid-August, which then rose to 60% by the end of September, meaning that approximately 40% of this variety crop was harvested under drought conditions. Among the late varieties, the accumulated harvest rate of Valencia and Folha Murcha reached 40% until mid-November, and 30% in the case of the Natal variety.

On the current updated estimate, considering the average of all varieties, the fruits are expected to be harvested with 4 grams less than the weight projected in September, therefore the number of oranges needed to fill a 40.8 kg box should increase from 258 (158 grams/5.57 oz per fruit) to 265 (154 grams/5.43 oz per fruit). For the Hamlin, Westin, and Ruby varieties, as well as for the group of other early varieties, the number of fruits remains stable at 305 fruits per box (134 grams/4.72 oz per fruit) and 272 fruits per box (150 grams/5.29 oz per fruit), respectively. The Pera variety, whose previous projection was 261 fruits per box (156 grams/5.50

oz per fruit), was updated to 267 fruits per box (153 grams/5.40 oz per fruit). The number of oranges per box for the Valencia and Folha Murcha varieties increased from 235 fruits per box (174 grams/6.14 oz per fruit) to 248 fruits per box (165 grams/5.82 oz per fruit). The Natal variety was revised from 242 fruits per box (169 grams/5.96 oz per fruit) to 248 fruits per box (165 grams/5.82 oz per fruit). The sizes by sector and variety are presented in Table 2.

Table 2 – Average fruit size, as pieces of fruit per box, by sector and variety[3]

Group of varieties	Sector (hatched values were presented in September and their respective values updated in December are on the left)					
	North	Northwest	Central	South	Southwest	Total
	(Fruits per box)	(Fruits per box)	(Fruits per box)	(Fruits per box)	(Fruits per box)	(Fruits per box)
Hamlin, Westin and Rubi……..	307 ~~301~~	279 ~~263~~	311 ~~313~~	312 ~~316~~	299 ~~300~~	305
Other earlies.....	284 ~~265~~	242 ~~239~~	281 ~~287~~	304 ~~292~~	262 ~~275~~	272
Pera….....	247 ~~251~~	233 ~~221~~	263 ~~247~~	296 ~~273~~	280 ~~292~~	267 ~~261~~
Valencia and Folha Murcha….....	240 ~~263~~	246 ~~193~~	245 ~~198~~	269 ~~249~~	247 ~~240~~	248 ~~235~~
Natal.....	232 ~~203~~	214 ~~216~~	264 ~~241~~	246 ~~253~~	249 ~~256~~	248 ~~242~~
Total.....	**255** ~~**261**~~	**242** ~~**223**~~	**267** ~~**245**~~	**283** ~~**270**~~	**265** ~~**268**~~	**265** ~~**258**~~

[3] The precision of the overall average of the citrus belt is higher than that of the sectors, or variety groups, due to the larger sample size.

The projection of the rate of premature fruit drop increased from 22% to 23% due to the higher greening severity and climatic factors. The low precipitation level recorded in September was accompanied by strong wind gusts exceeding 50 km/h in all producing regions, with four of them facing gusts above 62 km/h, according to data from Climatempo Meteorologia. Wind speeds between 62 and 74 km/h are classified as a gale capable of breaking tree branches, corresponding to a value of 8 on the international Beaufort scale (0 to 12). In the Avaré region, for example, the wind gust reached 90 km/h. The late harvest scenario, winter water deficit, and intense wind gusts recorded in September collectively contributed to increased fruit drop, primarily affecting plants with high severity of greening.

When analyzed by variety, the drop rate of Hamlin, Westin, and Rubi oranges rose to 16.9%, representing an increase of 1.9 percentage points compared to the September updated estimate. For other early varieties, the rate was adjusted to 18.5%, exceeding the previous estimate by 1.9 percentage points. The Pera variety drop rate was kept at 22%. The Valencia and Folha Murcha varieties showed an increase to 25.6%, with a positive variation of 0.7 percentage points. The Natal variety reached 28.5%, 3 percentage points above the September forecast. The fruit drop rate is still more intense in sectors where the incidence of greening is higher – such as the South, Central, and Southwest regions – and less intense in the North and Northwest regions, where greening prevalence is lower. Drop rates by sector and variety are detailed in Table 3.

Table 3 – Average drop rates by sector and variety[4]

Group of varieties	Sector (hatched values were presented in September and their respective values updated in December are on the left)					
	North	Northwest	Central	South	Southwest	Total
	(percentual)	(percentual)	(percentual)	(percentual)	(percentual)	(percentual)
Hamlin, Westin and Rubi……..	16.0 ~~12.2~~	7.7 ~~7.1~~	22.1 ~~20.2~~	19.3 ~~17.8~~	12.8 ~~12.0~~	**16.9** ~~**15.0**~~
Other earlies.....	11.0 ~~10.0~~	18.7 ~~15.5~~	20.0 ~~18.8~~	17.1 ~~17.6~~	22.2 ~~18.7~~	**18.5** ~~**16.6**~~
Pera….....	26.9 ~~21.6~~	16.4 ~~15.8~~	17.6 ~~20.0~~	24.2 ~~29.8~~	23.2 ~~20.7~~	**22.0**
Valencia and Folha Murcha….....	14.0 ~~12.4~~	20.0 ~~17.8~~	28.6 ~~21.7~~	36.0 ~~40.3~~	28.1 ~~31.1~~	**25.6** ~~**24.9**~~
Natal.....	20.1 ~~21.2~~	12.0 ~~9.7~~	28.9 ~~32.8~~	35.6 ~~45.9~~	30.6 ~~16.1~~	**28.5** ~~**25.5**~~
Total.....	**18.3** ~~**15.6**~~	**15.9** ~~**14.5**~~	**23.4** ~~**21.9**~~	**28.9** ~~**33.3**~~	**24.4** ~~**22.0**~~	**23.0** ~~**22.0**~~

[4] The precision of the overall average of the citrus belt is higher than that of the sectors, or variety groups, due to the larger sample size.

This estimate was projected based on the available data and will continue to be updated as the harvest progresses. The next update is set to be released on February 10, 2026.

The method used for the update is the same adopted in the previous crop season. Information was obtained from the monitoring survey started in May on 1,200 plots that are no longer visited when fruit harvest is complete. Other data used in this study is size of fruit received throughout the crop season by orange juice companies associated to Fundecitrus – Citrosuco, Cutrale and Louis Dreyfus – for industrial processing. Each processing company supplies individual data under confidentiality for the calculation of the average size of processed fruit.

[1] Hamlin, Westin, Rubi, Valencia Americana, Seleta, Pineapple, Alvorada, Pera, Valencia, Folha Murcha and Natal.
[2] Department of Exact Sciences, FCAV/Unesp Jaboticabal Campus.