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Report Name: The Rise of Lime Production in Brazil's Citrus Heartland

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Report Highlights:

Brazil is one of the largest producers and exporters of lime, with the Tahiti variety accounting for 97% of production. Driven primarily by small and medium-sized farmers, lime is becoming increasingly important within Brazil's citrus production, complementing the country's renowned orange industry. Tahiti limes are a hybrid fruit known for their large size, thick green skin, seedless nature, and ability to maintain a vibrant green peel throughout their shelf life.

Production

Brazil produces several varieties of lime and is one of the largest producers and exporters of lime. Brazil's production is dominated by the Tahiti variety, accounting for approximately 97 percent of total output. This production is largely driven by small and medium-sized farmers, who play a central role in commercial cultivation.

Tahiti lime is a hybrid fruit created by grafting Persian lime with bitter lemon (*Citrus limon*), which explains their seedless nature. As a hybrid, Tahiti limes are classified as "sour limes" rather than true lemons. They are characterized by their large size, thick green skin, and seedless composition. One of their most distinctive traits is their ability to retain a vibrant green peel throughout their shelf life - a quality highly valued in global markets, as any yellowing significantly reduces consumer appeal.

Sicilian lemon production is small in Brazil, primarily used in juice manufacturing, and some gourmet use within the country. Finger Lime production is even smaller but grown for their distinct flavor and are also used as a gourmet ingredient.

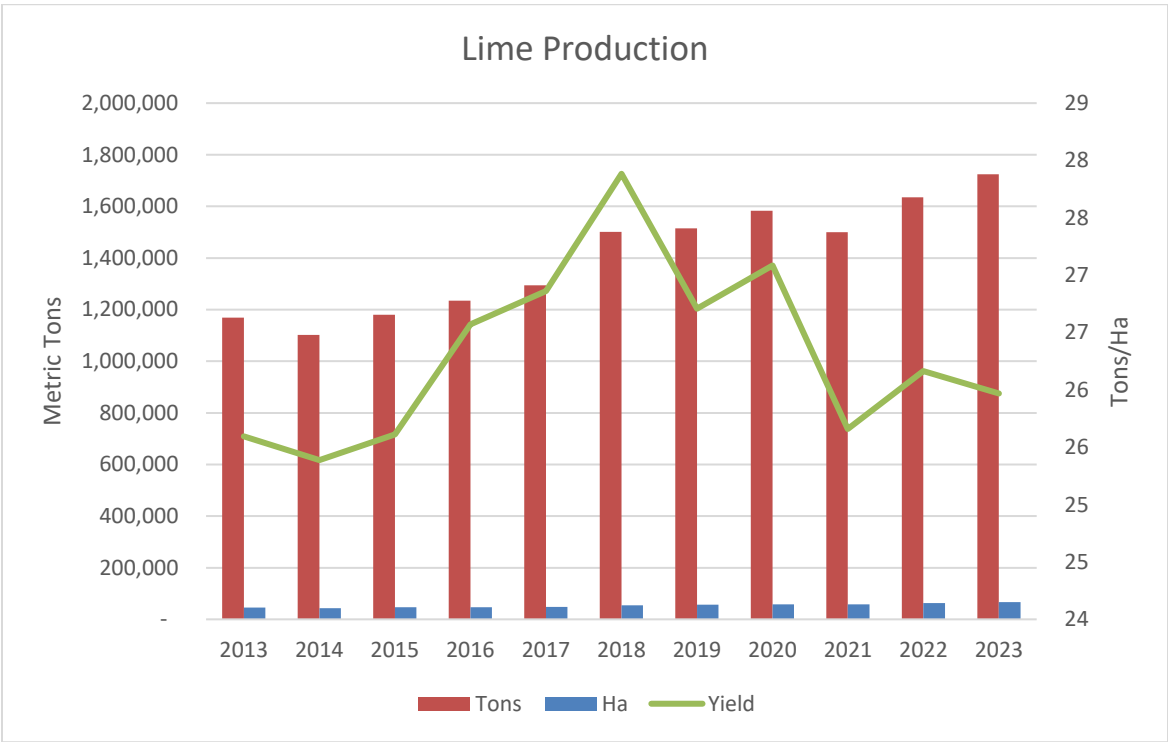
Compared to the orange industry, the lime industry is significantly less developed, resulting in limited appeal for large scale processing. Lime cultivation is strongly associated with smaller sized farms and 80 percent of properties are smaller than 25 hectares.

Growing Tahiti lime requires extra attention from farmers, mainly due to the concentrated supply from December to May and the challenges posed by diseases and pests common in citrus cultivation. Citrus Greening disease, also known as Huanglongbing, poses a significant threat to orange production and presents a major challenge to the overall citrus industry. In contrast, the impact on limes is generally less severe, as they are typically harvested before symptoms develop. Even when affected by the psyllid vector, the resulting damage to the fruit is minimal. The lime industry is also impacted by the canker, which affects fruit quality and tree health.

The peak productive age of a lime tree is approximately five years. The first harvest of the season occurs between November and March/April, with production volume fluctuating throughout the year. During this time, the trees are typically harvested every two weeks. From March to June, harvest activity reaches medium levels, whereas from July to November, the volume is comparatively lower. Brazil's lime production complements that of Mexico, and its consistent year-round availability provides Brazil with a significant competitive advantage in the global market.

Cepea (Center for Advanced Studies on Applied Economics) notes that the current Tahiti season has experienced reduced volumes due to weather disruptions in 2024, leading to notable fluctuations in supply during the first half of 2025. Moreover, the research center highlights that the processing industry extended fruit processing into early May, further diminishing spot market availability in June.

Figure 1
Lime Production



Source: IBGE, chart prepared by FAS Brasilia

Brazil’s lime sector has undergone remarkable growth over the past decade, driven by significant increases in both cultivated area and total production. From 2013 to 2023, lime production in Brazil increased yearly. In 2013, limes were harvested on approximately 46,036 hectares, yielding just over 1.16 million metric tons (MMT). By 2023, the harvested area expanded to 66,687 hectares - a 45 percent increase - while production rose to 1.72 MMT, marking a 47 percent growth. This expansion underscores Brazil’s strengthening position in the global lime market.

Data from the Brazilian Institute of Geography and Statistics (IBGE) indicates that the growth in Brazil’s lime production was driven primarily by the expansion of cultivated areas rather than significant improvements in yield. Yields saw modest gains in the early years, rising from 25-26 tons per hectare in 2013-2015 to a peak of 28 tons per hectare in 2018. However, they have since plateaued at 26 tons per hectare from 2021 to 2023. This stagnation reflects a national average, with notable regional variations. Although, the state of São Paulo, a key lime-producing region, achieved yields of 40 tons per hectare in 2025, according to Post contacts. The current yield plateau is also tied to market dynamics, as Brazil has the capacity to increase production significantly once new export markets become accessible.

Area

Lime production is concentrated in the Brazilian citrus belt, primarily within the states of São Paulo and Minas Gerais. The Triângulo Mineiro region (western part of Minas Gerais) and the northern part of São Paulo represent together over 90 percent of lime production.

Brazil's lime production includes 25,000 trees on approximately 70,000 hectares. Tahiti's productivity depends on planting spacing and rootstock choice, with yields ranging from six to twenty-one tons per hectare.

Figure 2

Brazilian Lime Production in Tons



Source: IBGE (2023), map prepared by FAS Brasilia

In addition to São Paulo and Minas Gerais, Brazil cultivates limes in Pará, Bahia, and Sergipe, while minimally in terms of total production, every state in Brazil grows limes. Brazil enhances its lime production by implementing rigorous quality standards, ensuring comprehensive traceability, and adopting innovative agricultural practices, such as the use of bio inputs, and drip irrigation techniques.

Expanding Market Presence and Diversifying Opportunities

Brazil is a prominent exporter of limes. It seeks avenues to enhance its global presence and overcome trade barriers, positioning itself as a leading player in the international fruit trade.

Brazil is historically focused on its domestic market rather than prioritizing policies to enhance fruit exports. The Association of Fruit and Derivative Producers and Exporters (Abrafrutas) notes that Brazil lacks sufficient bilateral agreements in place to facilitate the export of fruit, which may hinder international growth.

In April 2025, Brazil and India signed a bilateral agreement granting market access for five Brazilian citrus products: Tahiti lime, Sicilian lemon, orange, tangerine, and other tangerines and related citrus varieties. This results from collaborative actions between Abrafrutas, the Ministry of Agriculture and Livestock (MAPA), and the Ministry of Foreign Affairs (MRE). The initiative aims to expand Brazil's agricultural presence in high-value markets and enhance the global competitiveness of Brazilian citrus products. The entry into the Indian market provides access to one of Asia's most promising consumer bases, with over 1.4 billion people and significant growth potential for citrus exports.

Since 2014, Abrafrutas and the Brazilian Trade and Investment Promotion Agency (Apex) have been collaborating on the "Fruits of Brazil" project, a strategic initiative to promote Brazilian fruits in international markets. The project also highlights fruit derivatives such as juices, pulps, sweets, and other innovative products.

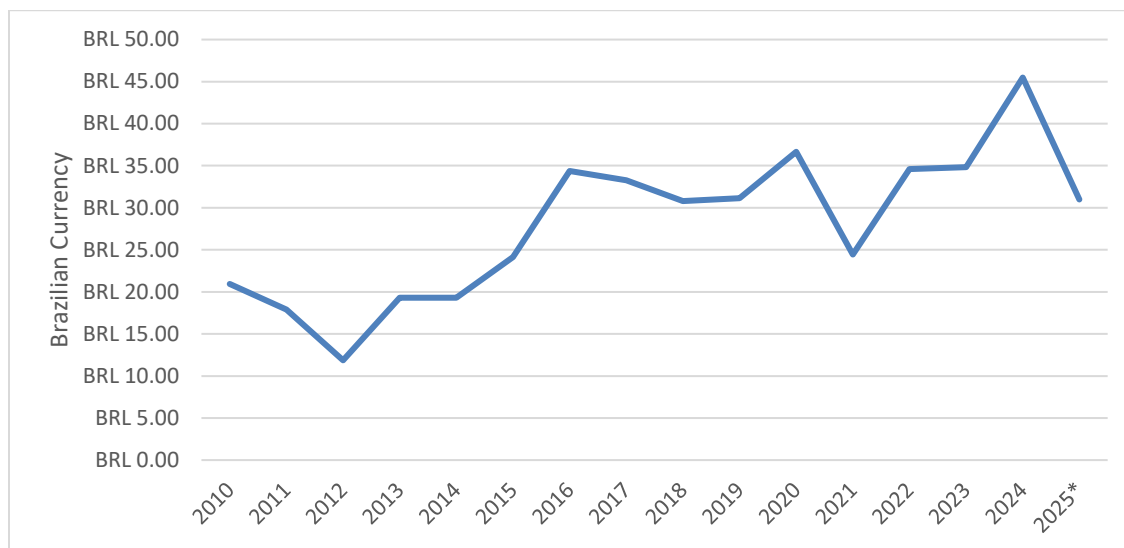
Price

Commercial lime prices remained steady until 2024, when both market value and production costs began to rise significantly. The rise in lime prices in Brazil is driven by multiple factors. Drought conditions have significantly reduced production and impacted fruit quality. Increased demand during the off-season, particularly during periods of hot weather, has further strained supply. Broader climate challenges, including prolonged dry spells and extreme heat, have exacerbated the situation. These combined issues resulted in crop losses and a limited supply, pushing prices higher.

Within the first quarter of 2025, a critical period for processing, the average price paid by the industry for the fruit was BRL 25.06 (USD 4.50) per 27-kilogram box (60 pounds). This represents a 55 percent increase compared to the same period in 2024 and is the highest for the first quarter since 2019, when the price was BRL 29.95 per box (USD 5.38) in real terms.

Surveys indicate that Tahiti lime prices increased throughout the first half of 2025, primarily due to limited supply.

Figure 2
Brazilian Lime Average Price



Source: Hortifruti/Cepea, chart by FAS Brasilia

*2025: Jan-July

During the week of June 9-12, 2025, the average price reached BRL 38.81 (USD 6.97) per 27-kg box, marking a 20 percent increase compared to the previous period. According to researchers, the volume available in the spot market has been increasingly constrained since May 2025, as weather conditions have hampered harvesting progress.

Additionally, external demand for Tahiti limes has intensified in July 2025, driven by the upcoming European summer, which is the primary market for fresh Brazilian fruit.

Consumption

In Brazil, lime is commonly used to prepare a large variety of desserts in confectionery, marinate numerous types of meats, make refreshing juices, and serve as a base for cocktails.

Beyond fresh consumption (50 percent), the fruit is processed into concentrated juice, with 40-50 percent of the fruit utilized industrially, while the remainder becomes industrial residue. This residue is rich in pectin, vitamin C, and fibers, making it valuable for the food, pharmaceutical, and animal feed industries. The essential oil extracted from the peel is highly valued and widely used in pharmaceuticals and soft drinks.

Additionally, due to its acidic nature, a minimal percentage of lime is also used and effective for cleaning surfaces covered in grease and rust, especially on metal objects, glass, barbecue grills, and stovetops.

In the 2024 harvest, the industry faced record-high prices for limes used in juice production. In both Europe and the United States, lime juice consumption is driven predominantly by processed products rather than fresh lime.

Approximately 75 percent of Brazil’s lime exports are destined for the European food service sector, with bars and restaurants representing the primary buyers, especially during warmer months. Europeans likely also consume limes at home, although there is no official data.

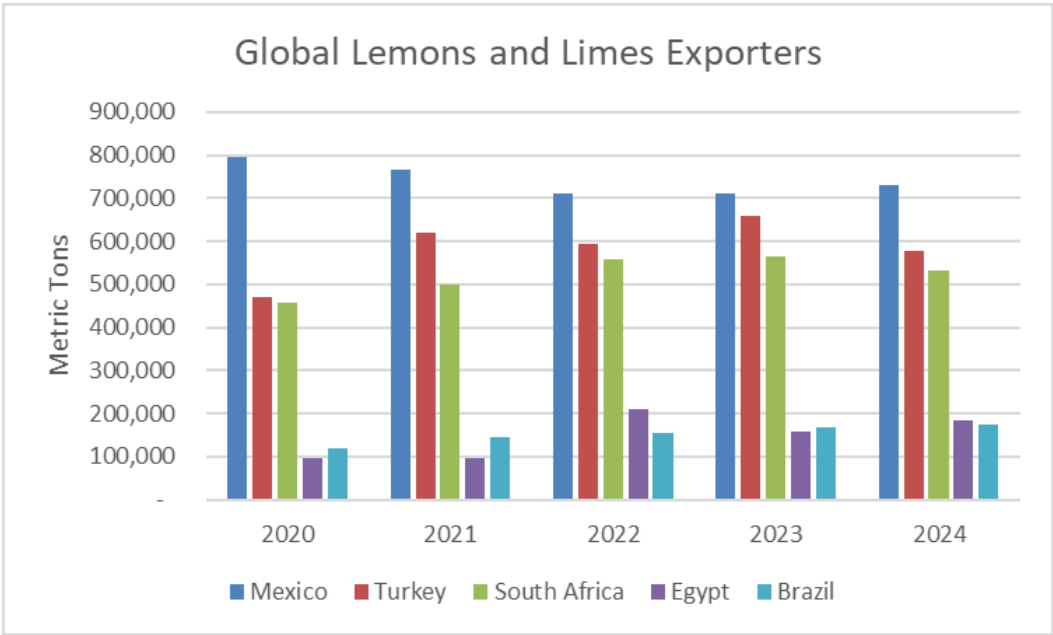
Lime quality preferences vary between American and European consumers. Americans generally prefer lighter-skinned limes, whereas Europeans favor darker varieties. Darker limes often have thicker skins and contain less juice. In the US, limes are primarily used in dishes like guacamole, burritos, and other recipes that demand more juice.

Approximately 50 percent of the limes processed in Brazilian packing houses are destined for domestic consumption, while the remaining half is exported.

Trade Landscape

Between 2020 and 2024, Mexico maintained its position as the global leader in exports of lemons and limes, despite experiencing a temporary decline in 2022. Mexico’s exports fell from 796,655 MT in 2020 to 710,422 MT in 2022 but rebounded steadily, reaching 729,109 MT by 2024. Turkey, the second-largest exporter, saw significant fluctuations during this period. Its exports surged to a peak in 2023 before declining in 2024, yet it consistently retained its position as the second-largest player in the global lime export market.

Figure 3
Global Lemons and Limes Exporters



Source: TDM (Trade Data Monitor), chart by FAS Brasilia

South Africa showed steady growth throughout most of the period, increasing exports from 457,886 MT in 2020 to a peak of 565,295 MT in 2023 before a slight dip in 2024. Egypt recorded the most dramatic increase, more than doubling its exports between 2021 and 2022. Although volumes dipped in 2023, they rose again in 2024.

Brazil, while the smallest among the top five exporters, demonstrated consistent year-on-year growth, expanding its exports by nearly 48 percent over the five-year period, from 118,866 MT in 2020 to 175,837 MT in 2024. Its gradual but steady rise reflects increasing competitiveness and export capacity, especially as it gains access to new markets. Brazil ranks as the world's second-largest exporter of Tahiti limes.

Mexico primarily exports to the United States and the European Union. In 2020, Mexico exported 757,346 MT to the US and 26,920 MT to the EU. By 2024, these figures shifted to 722,006 MT to the US and 2,968 MT to the EU.

Turkey's exports in 2024 were predominantly directed to Iraq (152,680 MT), Russia (125,183 MT), and the European Union (120,192 MT). South Africa's exports have shown consistent growth since 2020, with key destinations including the European Union, the Netherlands, and the United Arab Emirates. Notably, South Africa's exports to the EU reached 205,989 MT in 2024, marking a 26 percent increase. Egypt's lime exports in 2024 were concentrated in Saudi Arabia (80,516 MT), the United Arab Emirates (21,221 MT), and the European Union (16,164 MT), reflecting significant growth of 25 percent, 90 percent, and 86 percent, respectively, compared to 2020.

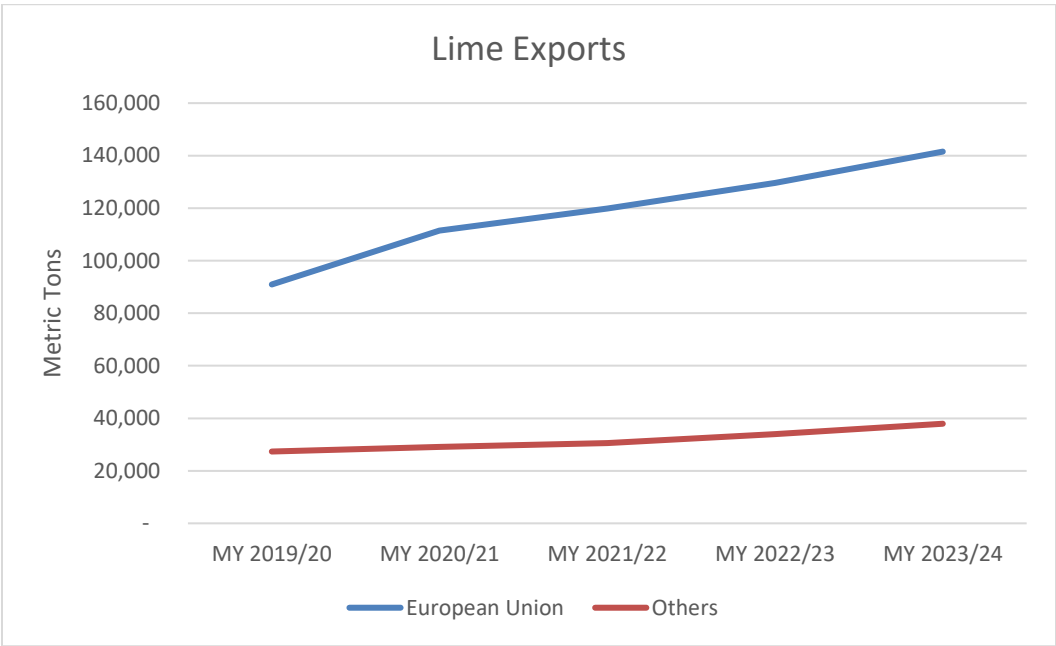
Brazilian Lime Trade

The Marketing Year (MY) for limes is from November 1 to October 30 of the following year. This report will use this timeframe to reference trade figures.

Brazil virtually does not import limes. The country occasionally imports lemon varieties such as Sicilian lemons from Spain, Chile, Argentina, or Uruguay; however, these volumes are minimal and do not significantly impact the domestic market.

Exports figures show a steady growth in Brazil's lime exports over the last five marketing-year period. The European Union (EU) remains the largest market for Brazilian lime exports, accounting for roughly 76-80 percent of total exports during these years. Exports increased from 90,765 MT in MY 2019/20 to 141,544 MT in MY 2023/24. The growth trend is consistent, with an average annual increase of approximately 10,200 MT. To other countries, exports grew modestly from 34,027 MT in MY 2022/23 to 37,923 MT in MY 2023/24. The increase has been relatively consistent, with an average annual growth of approximately 2,000 MT over the past five marketing years.

Figure 4
Brazilian Lime Exports

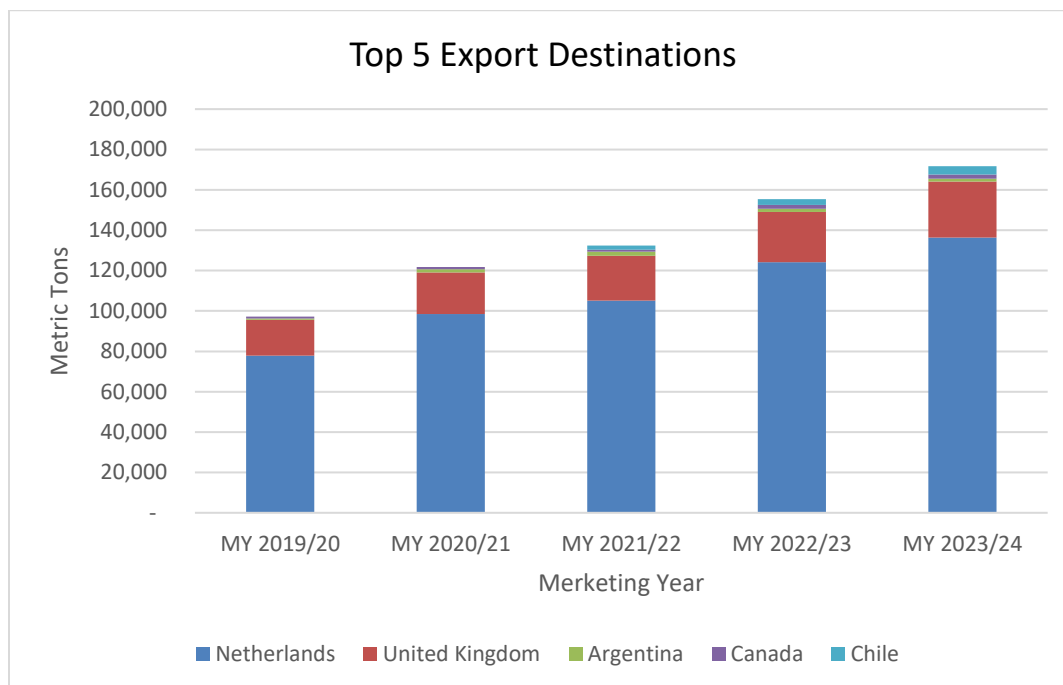


Source: TDM (Trade Data Monitor), chart by FAS Brasilia

Brazilian exports of Tahiti acid lime reached a record high in calendar year 2024, that of 175,821 MT, maintaining a strong shipping pace into the first half of 2025. In January 2025, Brazil shipped 17,150 MT of Tahiti lime - an all-time high for the month - marking an 18.1 percent increase compared to January 2024. Revenue from these exports reached USD 14.826 million, reflecting a growth of 13.4 percent year-over-year.

In the first half of 2025, limes ranked as the second most exported fruit from Brazil, totaling 106,655 MT. This represents an increase of 18.17 percent compared to the same period in the previous year.

Figure 5
Brazil's Top 5 Export Destinations



Source: TDM (Trade Data Monitor), chart by FAS Brasilia

In 2025, Brazil reached a historic milestone, exporting more than 80,000 MT of limes in the first half of the year. The state of São Paulo consolidates itself as a global epicenter of production, with exports of limes totaling USD 72 million in the referred period. In United Kingdom, Brazilian limes have become a benchmark for quality, size, and flavor, according to industry.

The Netherlands has consistently been the largest importer of Brazilian limes by a wide margin. Exports to the Netherlands grew from 77,889 MT in MY 2019/20 to 136,338 MT in MY 2023/24 - an increase of 75 percent over five years. This sharp upward trend underscores the Netherlands' function as a key European entry point for Brazilian limes, likely due to its strong re-export infrastructure and logistics hubs, such as the Port of Rotterdam.

The United Kingdom also showed steady growth in lime imports from Brazil, rising from 17,732 MT in MY 2019/20 to 27,843 MT in MY 2023/24, an increase of 57 percent, driven by consumption habits.

Argentina and Canada remained relatively small importers in volume but presented fluctuations. Argentina's imports rose from 630 MT in MY 2019/20 to a peak of 2,094 MT in MY 2021/22, before declining slightly to 1,423 MT in MY 2023/24. Canada's imports followed a somewhat similar trajectory, starting at 1,038 MT in MY 2019/20 and reaching 1,997 MT in MY 2023/24, with a notable dip in MY 2021/22 before rebounding strongly.

A notable entrant in the last three years is Chile, which did not import Brazilian limes before MY 2021/22 but has since shown robust growth. Starting with 2,057 MT in MY 2021/22, Chile's imports grew rapidly to 4,059 MT by MY 2023/24, nearly doubling in just two years.

Attachments:

No Attachments.

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