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Report Highlights:

The Brazilian orange crop for Marketing Year (MY) 2025/26 is forecast at 330 million 90-pound boxes (MBx) - standard reference, equivalent to 13.5 million metric tons (MMT), an increase of 3.7 percent compared to previous Post estimate (320 million boxes or 13 MMT), primarily due to satisfactory weather conditions expected in 2026. Post forecasts the Brazilian FCOJ 65 Brix equivalent production in MY 2025/26 at 1.03 MMT, an increase of 1.86 percent from Post's revised estimate for MY 2024/25 (1.01 MMT).

FRESH ORANGES

PS&D Table

The following table provides data for Brazilian fresh orange production, supply, and distribution (PS&D) for Brazilian (BR) marketing years (MY, July-June) 2024/25, 2025/26, and 2026/27. The MY mentioned above are equivalent to U.S. MY 2023/24, 2024/25, and 2025/26, respectively.

Table 1
Production, Supply and Distribution for Brazilian Fresh Oranges

Oranges, Fresh	2023/2024		2024/2025		2025/2026
Market Year Begins	Jul 2024		Jul 2025		Jul 2026
Brazil	USDA Official	New Post	USDA Official	New Post	New Post
Area Planted (HECTARES)	590000	590000	590000	590000	590000
Area Harvested (HECTARES)	570000	570000	570000	570000	570000
Bearing Trees (1000 TREES)	197194	197194	193000	200000	200000
Non-Bearing Trees (1000 TREES)	41176	41176	43000	42000	43500
Total No. Of Trees (1000 TREES)	238370	238370	236000	242000	243500
Production (1000 MT)	12300	12300	13000	13000	13500
Imports (1000 MT)	32	54	37	40	55
Total Supply (1000 MT)	12332	12354	13037	13040	13555
Exports (1000 MT)	0	0	0	0	0
Fresh Dom. Consumption (1000 MT)	2594	2616	2497	2500	2600
For Processing (1000 MT)	9738	9738	10540	10540	10955
Total Distribution (1000 MT)	12332	12354	13037	13040	13555
(HECTARES) ,(1000 TREES) ,(1000 MT)					
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query					

Note: There is a one-year lag between the BR MY and the U.S. MY. For example, BR MY 2025/26 is equivalent to U.S. MY 2024/25. To ensure data continuity, the current Brazilian MY 2025/26 will be referred to as U.S. MY 2024/25 throughout this report.

Production

Post forecasts the total Brazilian orange crop for MY 2025/26 (July/June) at 330 million 40.8-kg boxes (MBx) - standard reference equivalent to 90 pounds - or 13.5 million metric tons (MMT). This is an increase of 3.7 percent compared to the Post estimate for MY 2024/25 (320 million boxes or 13 MMT), due to satisfactory weather conditions expected in 2026.

According to Post contacts, despite the incidence of greening, MY 2025/26 crop is projected to perform well, especially if orchards benefit from milder temperatures, with little expected variation.

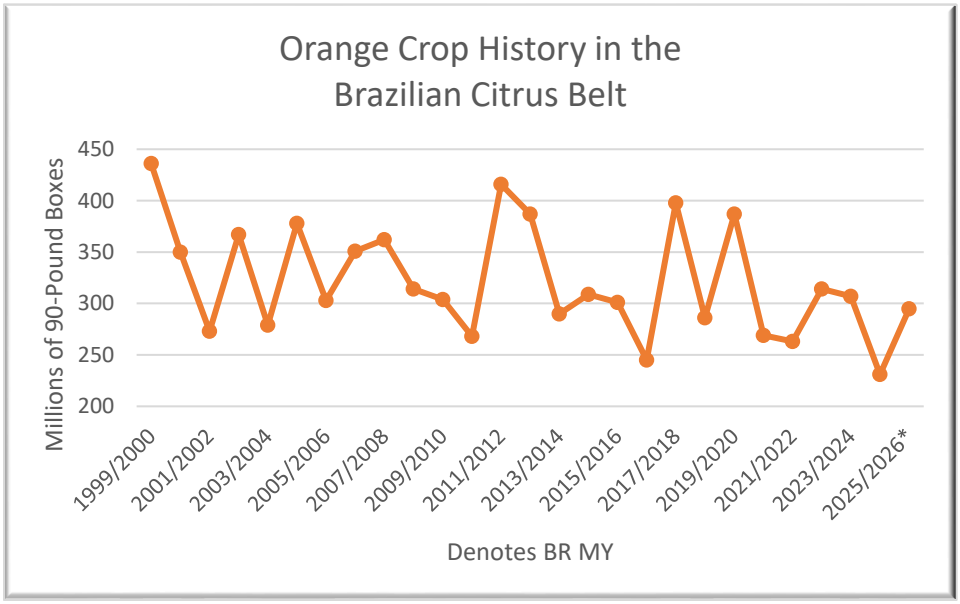
The citrus belt, which is composed of the northwest of São Paulo state and the western part of Minas Gerais state, known as “Triângulo Mineiro”, is the main production region in Brazil. The MY 2024/25 orange crop forecast for the citrus belt, released on December 10, 2025, by Fundecitrus in collaboration with FCAV/Unesp, projects total production at 294.81 million boxes (40.8 kg each). Of this total, approximately 26.93 million boxes are expected to be produced in the Triângulo Mineiro region.

According to Fundecitrus, the MY 2024/25 orange harvest began with two primary blooms, with the second bloom playing a critical role in crop development. Below-average rainfall and slower fruit maturation marked the early months, but conditions improved by late 2025, enhancing fruit quality, Brix-to-acidity ratios, and sensory attributes of the juice. While greening remains a concern, the outlook for production quality is increasingly positive.

From May to November 2025, total rainfall in the citrus belt reached 392 mm, 20 percent below the 1991–2020 average. According to Fundecitrus, the citrus belt experienced drier-than-normal conditions during the first nine months of 2024, a period critical for orange tree flowering. During this period, accumulated rainfall was 55 percent below average, resulting in insufficient soil moisture for non-irrigated groves to induce flowering.

In Brazil, approximately 20 percent of orange production is sold as fresh fruit (in natura), while the remaining 80 percent is processed for juice. The main orange varieties that Brazil produces are Hamlim, Westin, Rubi, Valencia Americana, Seleta, Pineapple, BRS Alvorada, Pera Rio - pear orange, Valencia, “Folha Murcha” Valencia, and Natal.

Figure 1
Orange Production History in the Brazilian Citrus Belt



Source: Fundecitrus Data, chart elaborated by FAS Brasilia
2025/2026* (BR MY): projection

Figure 1 shows the history of orange production in the Brazilian citrus belt, reflecting significant oscillations over the course of twenty-five years. Production ranged from 436 million 40.8-Kg/90-pound boxes (18.36 MMT) in BR MY 1999/2000 to the estimated 294 million (12 MMT) BR MY 2025/26, a projected decrease of 32 percent from the previous harvest (BR MY 2024/25), due to fruit drop and reduction in size. Nevertheless, Post contacts indicate the current harvest is the largest since 2020.

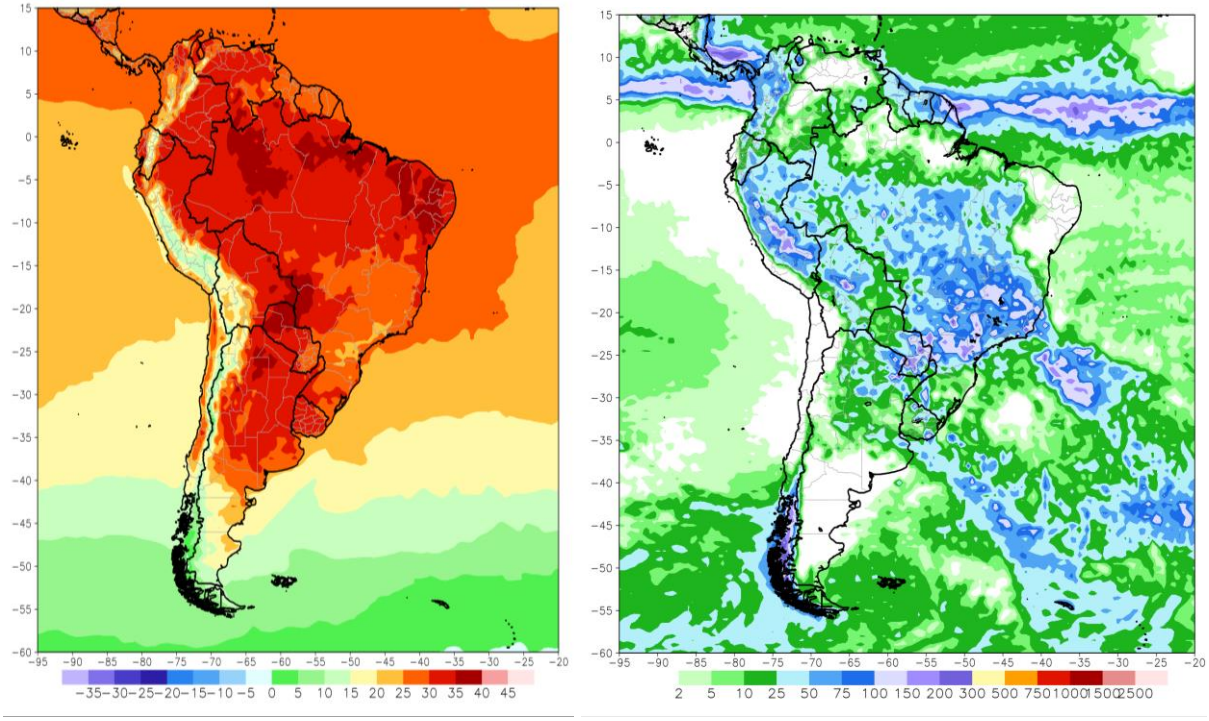
According to the latest estimates from Fundecitrus, the average weight of fruit is 4 grams lower than projected in September. As a result, the number of oranges required to fill a 40.8 kg box has increased from 258 (158 g/5.57 oz each) to 265 (154 g/5.43 oz each).

The southwest region (Itapetininga and Avaré) leads with 1,103 boxes/hectare, up 23 percent from last season, likely maintaining top status, according to Fundecitrus. The most challenging area is northwest region (Votuporanga and São José do Rio Preto), with low yield at 552 boxes/hectare, still 16 percent above previous levels. The north region experienced the highest change, at 41.8 percent.

September 2025 rainfall in key citrus regions of São Paulo and Minas Gerais helped induce flowering in certain orchards, but the volume remained insufficient to offset the ongoing water deficit. October 2025 rains begun improving conditions for orange trees and preparing them for next season's blooms, according to the Center for Advanced Studies on Applied Economics (Cepea). Mid-season oranges, which are essential for the juice industry, were previously in high supply. However, concerns about fruit drop may limit the total harvest volume for the MY 2024/25 (BR MY 2025/26) season.

Figure 2

Extreme Maximum Temperature in Brazil (in °C*) and Total Rain Fall, December 12-18, 2025*



Source: NOAA/CPC

A recent NOAA report indicates that although La Niña is currently weak, it is expected to continue influencing Brazil's climate through early summer 2025. The phenomenon will likely bring increased rainfall to the Center-West and Southeast regions, milder temperatures along the coast, and more frequent storms. In contrast, the South is expected to experience variable, but not extreme, weather conditions

According to Post contacts, weather conditions in 2025 were generally stable, which supported strong crop production. However, the citrus belt faces ongoing dry spells, heat waves, and rising temperatures from La Niña, expected to last until March 2026. The past five years have also seen high temperatures, with 2026's outlook depending on La Niña's strength.

By mid-2026, the likelihood of El Niño - typically associated with hotter weather and irregular rainfall in Brazil - begins to rise, potentially becoming dominant in 2027. This could significantly alter rainfall patterns and temperatures, making it essential for Brazilian farmers and to monitor updates and prepare for possible climate extremes.

Climatempo reports that rainfall in Brazil's citrus belt from May to August 2025 averaged 94 mm, 33 percent below the historical average (1991-2020), except in São José do Rio Preto, which saw 21 percent above-average precipitation. Despite this, April and June rains provided sufficient soil moisture, keeping the weight of early varieties like Hamlin, Westin, and Rubi stable at 134 g (305 fruits per box).

Within the citrus belt regions, in 2025, only Porto Ferreira exceeded historical rainfall levels; all other regions fell short. The North experienced the steepest declines, with deficits between 32 percent and 47 percent. São José do Rio Preto and Brotas saw drops of 21 percent, followed by Matão and Duartina (18 percent), Avaré (17 percent), Itapetininga (15 percent), Votuporanga (11 percent), and Limeira (6 percent).

Area

Post forecasts area planted for oranges at 590,000 ha for MY 2025/26, unchanged from the previous estimate for MY 2024/25. Approximately 7.5 percent of the citrus belt is replanted annually, mainly relocating trees within the orchard without changing overall numbers. According to Post contacts, uprooting and replanting are traditional practices in the citrus belt, though recent increases occur in other regions. This does not necessarily expand Brazil's total planted area.

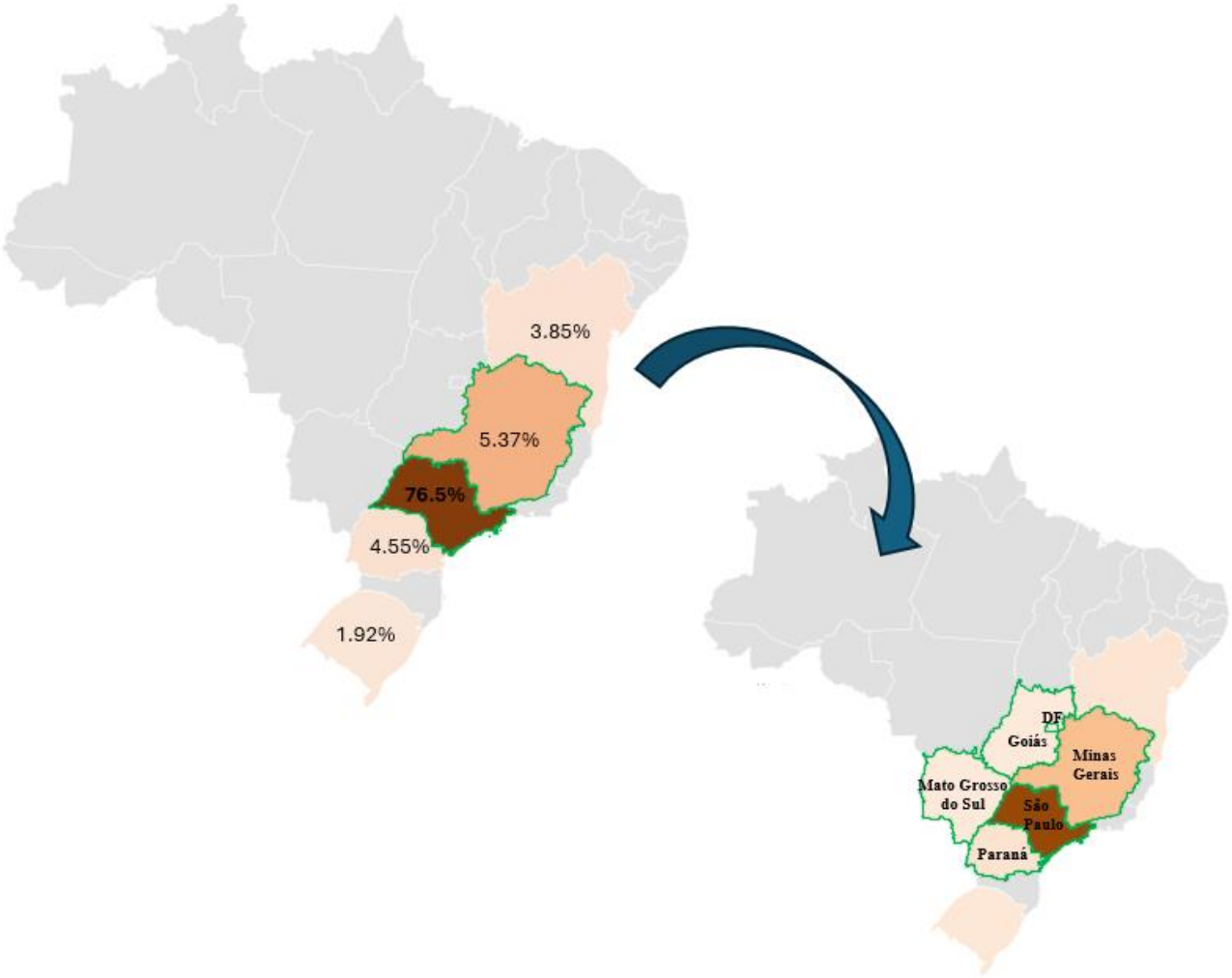
São Paulo is the only state that compiles trees planted and tree inventory data. According to crop data from Fundecitrus released in December 2025, bearing trees in São Paulo are estimated at 182.7 million in MY 2024/25, 7.5 percent above the 2022-mapping. Area is estimated at 362,160 hectares in the citrus belt.

Traditionally concentrated in São Paulo, Triângulo Mineiro, and southwestern Minas Gerais, the Citrus Belt is expanding to include new regions such as Mato Grosso do Sul, Goiás, Paraná, and the Federal District, forming the Expanded Citrus Belt (ECB). However, this does not have an impact on total planted area for MY 2024/25 and MY 2025/26. According to Post contacts, approximately 50 percent of new planting is outside traditional areas, predominantly in Mato Grosso do Sul and also in Canastra Mountains (Serra da Canastra) in Minas Gerais.

The results from the expansion are expected in 3-4 years. The model was applied to more than two thousand municipalities across these states. Phytosanitary standards are also being developed to support citrus cultivation.

The first Brazilian map on Figure 3 shows the main citrus-growing regions, according to data from IBGE (2024), denoting the Brazilian citrus belt outlined in green (76.5 percent in São Paulo and 5.37 percent in Minas Gerais). It also includes the states of Paraná (4.55 percent), Bahia (3.85 percent); and Rio Grande do Sul (1.92 percent).

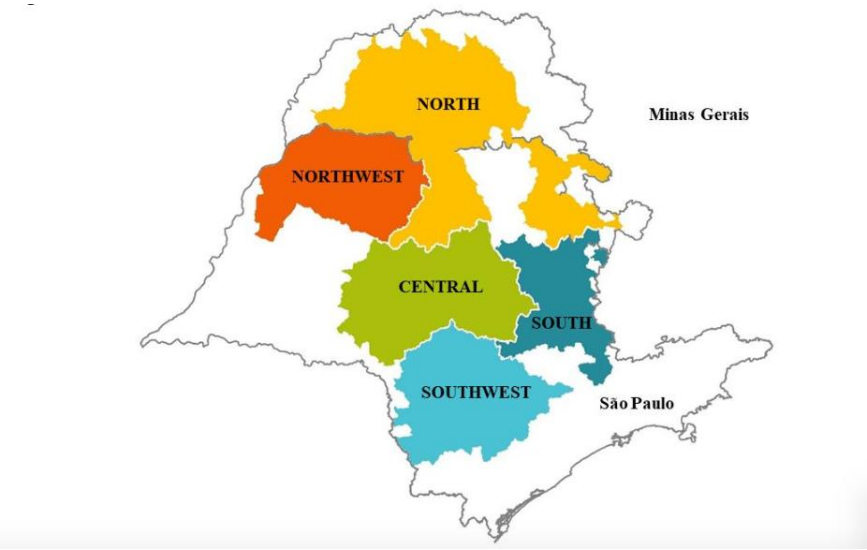
Figure 3
Main Citrus-Growing Regions in Brazil



Source: IBGE 2024/updated as of 10/03/2025, chart by FAS Brasilia

The second map of Brazil highlights the expanded citrus belt area, which includes Paraná, Mato Grosso do Sul, Goiás, and the small square representing the Federal District (DF, in Portuguese), moving in a clockwise direction.

Figure 4
The Five Regions of the Citrus Belt



Source: Fundecitrus, Tree Inventory and Orange Crop Forecast BR MY 2025-26

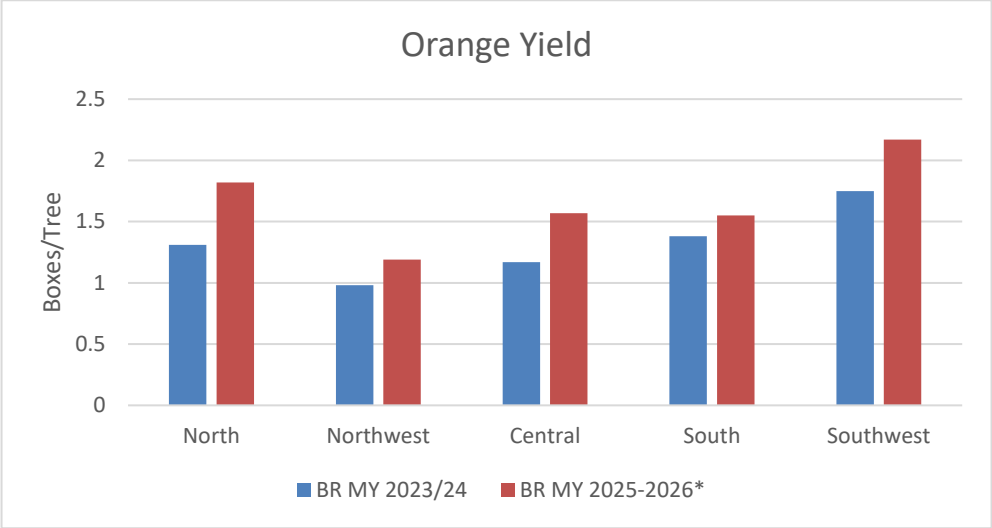
Tree Inventory and Yields

Post forecasts the total Brazilian tree inventory for MY 2025/26 at 243.8 million trees, - of which 200.3 million are bearing trees and 43.5 million are non-bearing trees - an increase of 0.7 percent compared to 242 million of total trees estimated for MY 2024/25.

The latest Fundecitrus estimate indicates that, on average, oranges are 4 grams lighter than projected in September. As a result, the number of oranges required to fill a 40.8 kg box has increased from 258 to 265. For Hamlin, Westin, and Ruby varieties, as well as other early varieties, the count remains stable at 305 and 272 fruits per box, respectively.

According to Post contacts, in 2025 the citrus industry saw a strong second bloom beginning in October, with Pera Rio and late varieties performing well. In contrast, early varieties experienced a less favorable first bloom. Favorable weather conditions supported good fruit development and minimal drop-offs during the second bloom, making the BR MY 2024/25 harvest notable. Although early varieties had lower juice quality, most Pera Rio and late varieties produced excellent fruit with high industrial yield, even in orchards affected by greening where the disease was less severe.

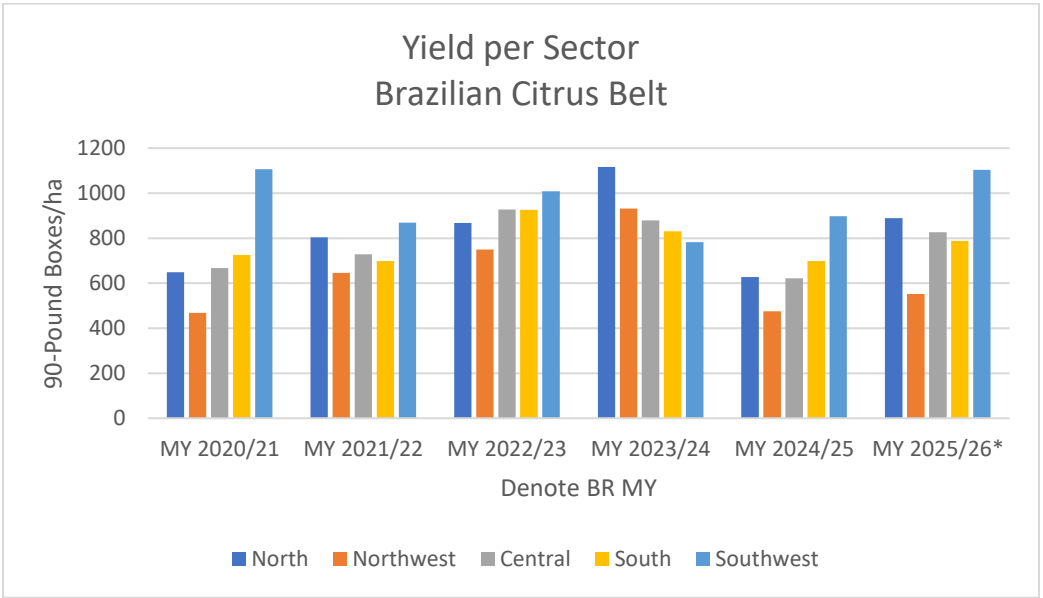
Figure 5
Yield Estimate in the Brazilian Citrus Belt



Source: Fundecitrus, chart by FAS Brasilia
* BR MY 2025/26: estimate by Fundecitrus

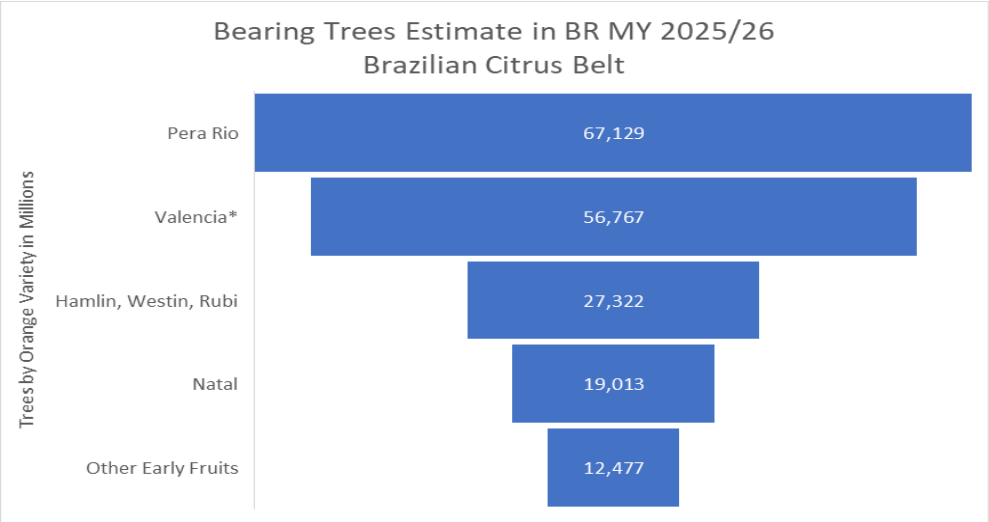
The typical production for this crop amounted to 869 boxes per hectare and 1.72 boxes per tree, according to Fundecitrus, representing a 26 percent rise compared to the previous harvest season (2023/24), which yielded 687 boxes per hectare and 1.37 boxes per tree.

Figure 6
Yield per Region in the Brazilian Citrus Belt



Source: Fundecitrus, chart by FAS Brasilia
* BR MY 2025/26: estimate by Fundecitrus

Figure 7
Estimate of Brazilian Citrus Belt Bearing Trees in MY 2024/25



Source: Fundecitrus, chart by FAS Brasilia
Valencia*: Valencia and Valencia Folha Murcha
Other early fruits: Valencia Americana, Seleta, Pineapple, and Alvorada

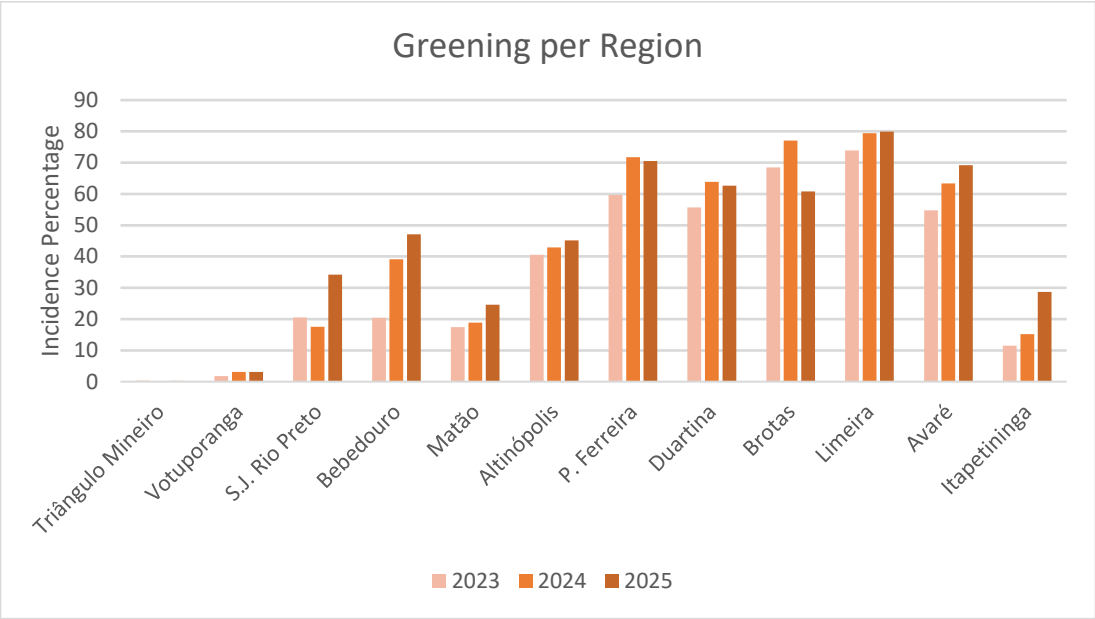
Greening

The spread of huanglongbing (HLB or greening), the world's most devastating citrus disease, is reshaping Brazil's citrus production landscape. According to researchers, the shift to expanded area as one of the best agricultural practices for combating greening is a necessary adaptation to ensure innovation of Brazil's citrus industry.

Psyllid levels remain significantly higher than pre-2020 levels, and disease severity increased from 18.7 percent in 2024 to 22.7 percent in 2025, leading to higher premature fruit drop. The incidence of greening disease in São Paulo and the Triângulo/Southwest Minas Gerais citrus belt rose to 47.63 percent in 2025, a 7.4 percent increase from 2024, according to Fundecitrus. Limeira, Porto Ferreira, and Avaré are among the most affected regions, with over 60 percent incidence, while Votuporanga and the Triângulo Mineiro report the lowest rates. Fundecitrus recommends region-specific management strategies, including strict psyllid control in high-incidence areas and immediate removal of infected trees in low-incidence regions.

Improved practices, such as planting in lower-risk areas, removing infected trees within five years, and replanting immediately, contributed to control greening. Older orchards remain the most affected, with 58.43 percent of trees over 10 years infected, compared to just 2.72 percent in orchards under two years old.

Figure 8
Greening Incidence per Region



Source: Fundecitrus data, chart by FAS Brasilia

Inaugurated in 2025, the Applied Research Center in Innovation and Sustainability of Citriculture (CPA in Portuguese) was created to promote the formation of new research groups and consolidate existing ones, aiming to develop control measures for greening. In addition to research, the CPA will have a strong role in education, and technology transfer. All technologies generated will be transferred to producers through meetings, training, and field days. This partnership between Fundecitrus, Fapesp, and Esalq/USP, will have an investment of approximately BRL 90 million (USD 17 million) over the next five years, renewable for another five.

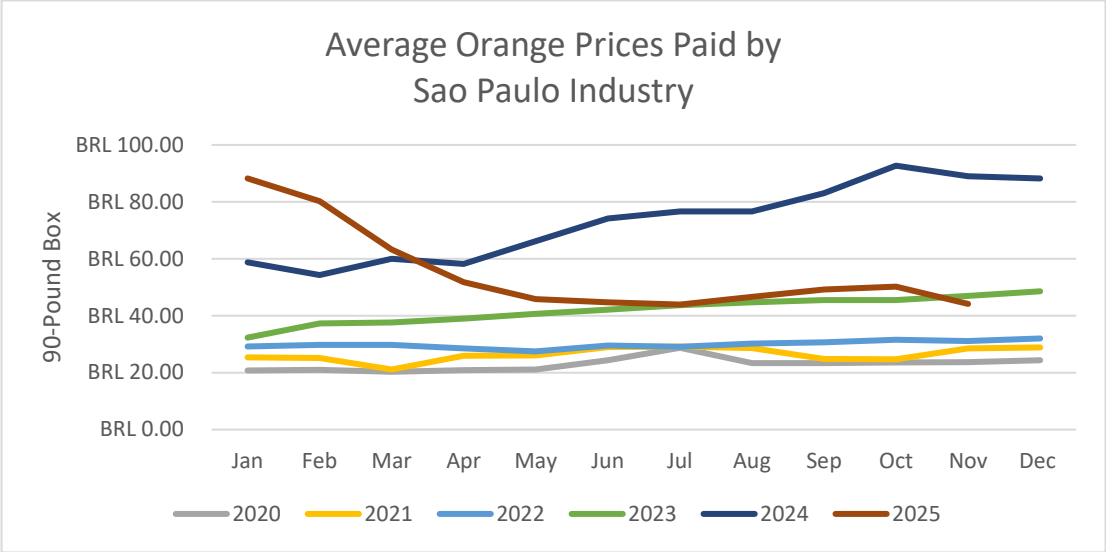
In July 2025, the Ministry of Agriculture (MAPA) updated regulations to combat greening, establishing the National Program for Prevention and Control. The update includes stricter disease monitoring, vector control, and plant eradication, with responsibilities assigned based on regional disease incidence. Citrus nurseries must produce grafts and seedlings in protected environments with anti-aphid screens. The regulation also requires removing host plants near orchards when vectors are present and mandates ongoing orchard monitoring, movement restrictions, and semiannual reporting.

Prices

MAPA established minimum orange prices for the BR MY 2025/2026 harvest. For table oranges, the minimum price is set at BRL 28.44 (USD 5.25) per 90-pound box for most of Brazil, reflecting a 19.35 percent increase from the previous season, while in Rio Grande do Sul, the price is BRL 25.19 (USD 4.65) per box, up 17 percent. These prices are effective from July 2025 to June 2026.

Figure 9

Average Orange Prices Paid by São Paulo Industry

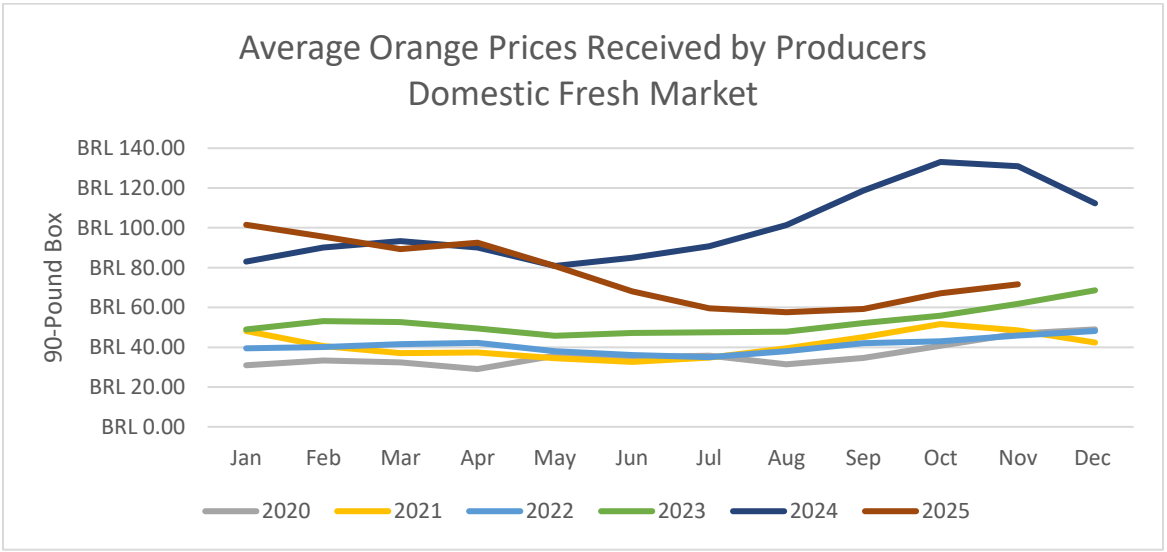


Source: CEPEA/ESALQ, elaborated by FAS Brasilia

From 2020 to 2024, orange prices paid by São Paulo industry have exhibited a significant upward trend, with prices in January increasing from approximately BRL 20.71 (USD 3.82) to a BRL 88.26 (USD 16.29) in 2024. Prices are seasonally variable, lower in the first half of each year and higher in the latter months. In 2025, prices ranged from BRL 88.22 (USD 16.28) in January to BRL 44.13 (USD 8.14) in November. According to Cepea, table orange prices have declined due to weaker sales. After a period of strong demand and rising prices, the market has softened in the second half of 2025.

Figure 10

Average Orange Prices Received by Producers in Domestic Fresh Market



Source: CEPEA, chart by FAS Brasilia

From 2020 to 2023, prices gradually rose from BRL 30.93 (USD 5,71) to over BRL 66.60 (USD 12.29). In 2024, prices skyrocketed from May onward to BRL 112.31 (USD 20.72) in December. In 2025 price ranged from BRL 101.51 (USD 18.73) in January and reaching BRL 71.57 (USD 13.21) in November.

Consumption

Post forecasts Brazilian orange consumption for MY 2025/26 at 2.6 MMT, an increase of 3 percent compared to Post estimate for MY 2024/25 (2.5 MMT), due to an estimated in demand due to low prices.

Note that fruit delivered to processors for "not from concentrate" (NFC) orange juice production for the domestic market is not included as fresh orange consumption but as "Delivered to Processors for NFC Production". Fresh domestic consumption estimates are calculated as the difference between production estimates and the volume of oranges delivered to processors for FCOJ and NFC produced for domestic consumption and export. There is no official data on orange consumption.

Factors including the growing demand for citrus co-products are driven by the industry's increasing focus on innovation and economic efficiency, with full utilization of oranges reducing waste, boosting profitability, and opening new markets. This movement promotes a circular economy within the citrus industry by ensuring every part of the fruit is utilized. Academic research from the University of São Paulo (USP) and São Paulo State University (Unesp) further supports this trend, seeking to optimize waste processing, and enhance valorization, collectively fostering innovation in Brazil's citrus sector.

According to Post contacts, farm-level orange prices declined, but this reduction was not passed on to consumers. Retail prices have remained high and unchanged since the beginning of 2025, so the lower costs for oranges and orange juice are not reflected in consumer prices.

Additionally, items like essential oils, d-limonene, terpenes, pectin, and fibers now have stronger demand, increasing significance and demand. This shift has led to a rebranding within the sector, viewing these derivatives as ingredients or co-products, essential for innovation and business growth.

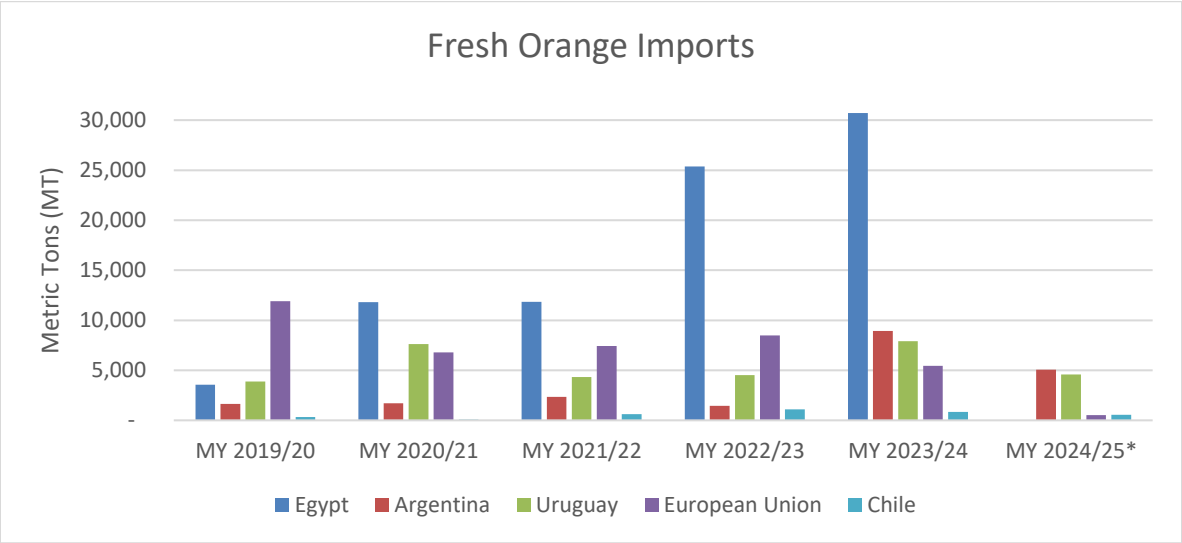
Exports

Total fresh orange exports for MY 2025/26 are projected at virtually zero, based on information from SECEX. Brazil has limited market access to other countries, due to pests that prevent the export of fresh oranges.

Imports

Egypt has become the leading supplier of fresh oranges to Brazil, with imports rising sharply in recent years. Argentina and Uruguay have shown more volatility but remain important sources. The European Union's role (represented by Spain only) has diminished significantly, while Chile continues to supply modest quantities. The partial data for MY 2024/25 suggests that Egypt, Argentina, and Uruguay may continue to be key players, but full-year trends will depend on developments in the remaining months.

Figure 11
Brazil's Fresh Orange Imports



Source: TDM, chart by FAS Brasilia
MY 2024/25*: Jul-Nov 2025

Egypt has emerged as the dominant supplier of fresh oranges to Brazil in recent years. The most significant jump occurred in MY 2022/23, with imports more than doubling to 25,361 MT, and then rising further to 30,704 MT in MY 2023/24.

Imports from Argentina have fluctuated over the period shown in the graph. MY 2023/24 saw a significant rebound to 8,918 MT. The partial MY 2024/25 figure is 5,061 MT, which is already higher than most previous full-year totals, indicating a possible sustained increase in imports from Argentina.

Uruguay's exports to Brazil have also shown variability. There was a notable increase to 7,911 MT in MY 2023/24, but the partial MY 2024/25 figure is 4,593 MT, suggesting a possible return to previous levels if the trend holds for the rest of the marketing year.

Spain was a significant supplier in MY 2019/20, with 11,914 MT, but imports declined each year, reaching just 529 MT in the partial MY 2024/25. This downward trend may reflect changing trade policies, increased competition, or shifting consumer preferences.

ORANGE JUICE

Production

PS&D Table

Table 2
Production, Supply and Distribution of Brazilian Orange Juice

Orange Juice	2023/2024		2024/2025		2025/2026
Market Year Begins	Jul 2024		Jul 2025		Jul 2026
Brazil	USDA Official	New Post	USDA Official	New Post	New Post
Deliv. To Processors (MT)	9738000	9738000	10540000	10540000	10955000
Beginning Stocks (MT)	8170	8170	4000	4900	5900
Production (MT)	930000	828755	1011840	1012840	1032076
Imports (MT)	0	0	0	0	0
Total Supply (MT)	938170	836925	1015840	1017740	1037976
Exports (MT)	874170	777025	953840	953840	973276
Domestic Consumption (MT)	60000	55000	58000	58000	58700
Ending Stocks (MT)	4000	4900	4000	5900	6000
Total Distribution (MT)	938170	836925	1015840	1017740	1037976
(MT)					
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query					

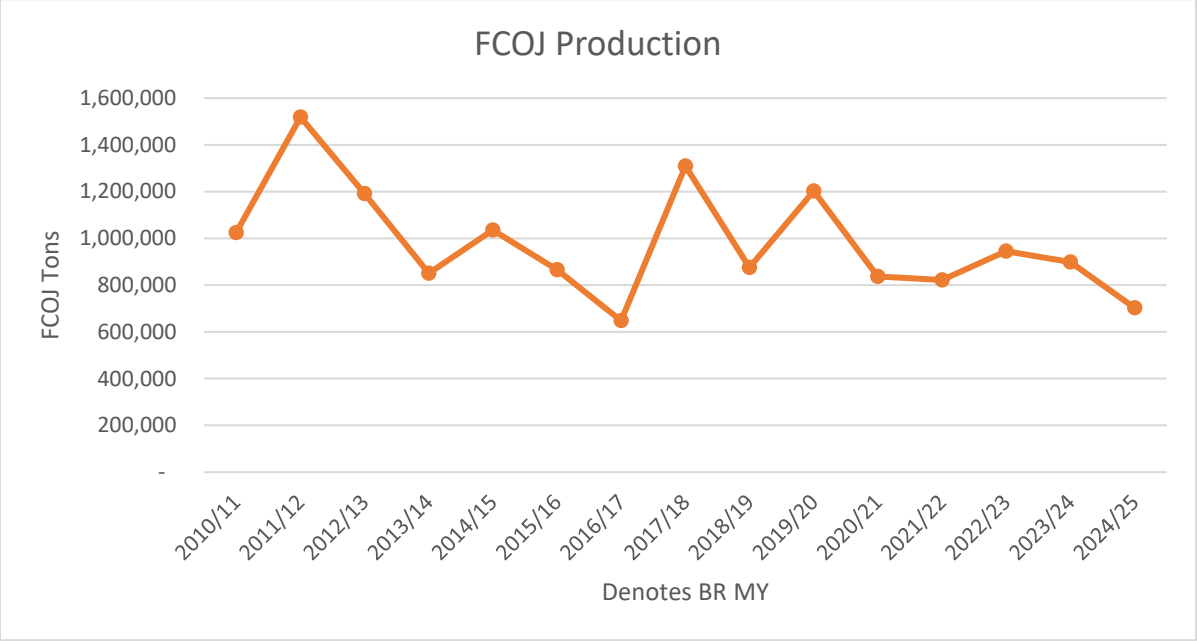
Note: There is a one-year lag between the BR MY and the U.S. MY. For example, BR MY 2025/26 is equivalent to U.S. MY 2024/25. To ensure data continuity, the current Brazilian MY 2025/26 will be referred to as U.S. MY 2024/25 throughout this report.

Production

Post forecasts the Brazilian FCOJ 66 Brix equivalent production for MY 2025/26 at 1.03 MMT, an increase of 1.86 percent from Post's revised estimate for MY 2024/25 (1.01 MMT), due to best agricultural production improvements.

The industry improved efficiency, requiring 276.9 boxes to produce one ton of FCOJ, a 7.1 percent improvement from the previous season. This partially offset losses by extracting more juice per box. For the MY 2024/25 harvest, slower maturation and low Brix-to-acidity ratios are expected, with improvements anticipated only in late 2025.

Figure 12
Production of FCOJ Equivalent 66 Brix in Brazilian Citrus Belt



Source: CitrusBR, chart by FAS Brasilia

The most recent years show a downward trend, with BR MY 2023/24 producing about 898,600 tons and BR MY 2024/25 dropping further to 703,200 tons.

Consumption

Post forecasts domestic FCOJ equivalent consumption in MY 2025/26 at 58,700 MT, 66 Brix, 1.2 percent more than estimate for MY 2024/25 (58,000 MT). According to Post contacts, growth expectations for consumption in the coming years are projected to increase. Orange juice is valued for its appealing taste and nutritional benefits. Nevertheless, market volatility is expected to fluctuate, driven by unpredictable weather patterns, pest pressures, and evolving trade conditions.

Brazil is the world's leading producer of orange juice, an elastic product supplying around 60 percent of global consumption through a highly advanced industrial and agricultural sector. This established Brazil as a global reference not only in production but also in innovation within the citrus industry.

NFC juice is the most widely consumed in Brazil, with an annual consumption of approximately 250 to 300 million liters (approximately 309,000 MT), FCOJ is consumed both in the United States and in Europe, with the European market split evenly between FCOJ and NFC. In contrast, the United States predominantly favors NFC orange juice.

The global orange juice industry is grappling with changing consumer preferences, particularly in developed markets where functional and probiotic beverages are gaining popularity over traditional juices. While Brazilian exporters recently avoided tariff hikes, the sector now faces declining demand, price volatility, and weather conditions that impact fruit production. According to industry, global juice

consumption is shrinking in mature markets like Europe and North America, even as revenue grows due to inflation. Functional drinks and immunity-boosting "shots" are reshaping consumer behavior, creating both risks and opportunities for juice producers.

Brazil's orange juice sector also faces growing competition from emerging players like Egypt, Turkey, Greece, and South Africa, which are expanding production. Egypt plans to process 50 million orange boxes annually within five years, up from 8 million today, leveraging lower costs and the absence of greening disease. While these countries lack Brazil's scale, their collective growth may pose a strategic challenge. Industry consolidation may accelerate globally, as tight margins and overcapacity push smaller processors and bottlers toward mergers.

Exports

Post forecasts Brazilian FCOJ 66 Brix equivalent exports in MY 2025/26 at 973,276 MT, a slight increase of 2 percent compared to Post estimate for the previous crop (953,840 MT). According to Post contacts, the country is exploring new markets in Europe, as well as the People's Republic of China (PRC), with a slight presence already in place. There are a few projects and campaigns from the Brazilian Trade and Investment Promotion Agency (Apex) already underway to promote the Brazilian orange juice to other markets, such as "Orange Juice, a good choice"; and the IFU Juice Conference.

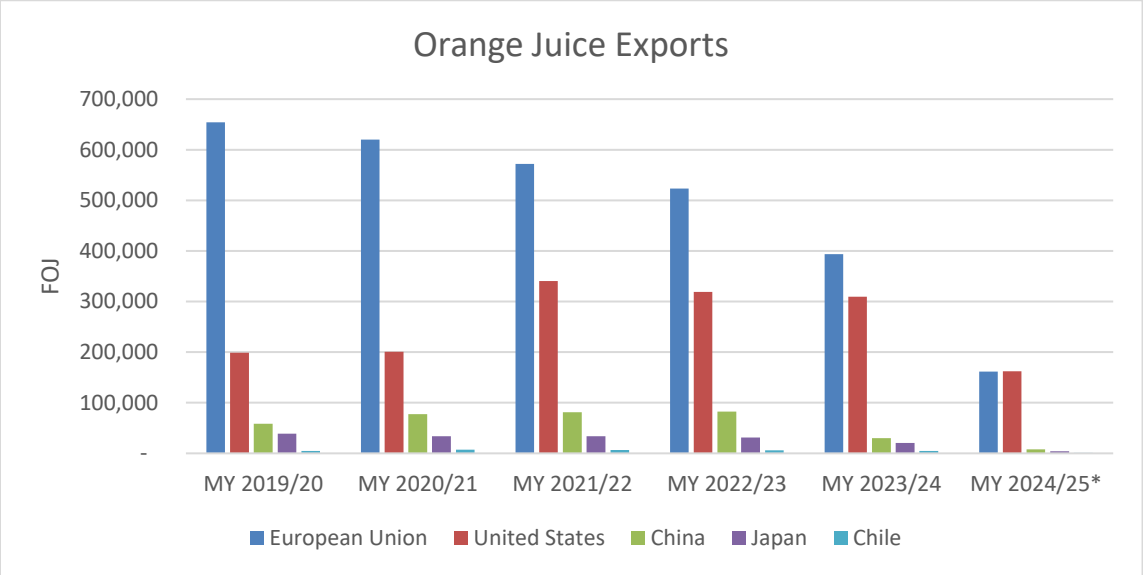
Organized by the International Fruit and Vegetable Juice Association (IFU) in partnership with CitrusBR, the event brought together Brazilian business leaders and international buyers from over 28 countries. ApexBrasil was the official sponsor of the 2025 edition, which hosted around 250 participants and served as a key platform for business development, networking, and strengthening Brazil's presence in the global juice market.

Brazil is the world's largest supplier of concentrated juice, remaining capable of large-scale production, despite oscillations in production. The country plays a crucial role in meeting U.S. demand, as 80 percent of the orange juice consumed in the U.S. is imported, primarily from Brazil and Mexico. This reliance has grown due to Florida's declining citrus production, driven by the spread of greening disease (HLB).

The European Union (EU) remains the dominant market for Brazilian orange juice. However, there is a downward trend over the period. Exports to the EU decreased from 654,098 MT in MY 2019/20 to. MY 2025/26 161,413 MT so far in MY 2025/26.

Exports to the U.S. fluctuated but generally remained robust, peaking at 340,736 MT in MY 2021/22. Since then, there has been a gradual decline, with 309,668 MT exported in MY 2023/24 and 161,958 MT in the partial MY 2025/26. Despite the decrease, the U.S. continues to be a critical destination for Brazilian orange juice, due to its large consumer base and established trade relationships.

Figure 13
Orange Juice Exports (Brazilian Main Partners)



Source: TDM, chart elaborated by FAS Brasilia
MY 2024/25*: Jul – Nov

Exports to the PRC have shown some volatility but remain significantly lower than those to the EU and U.S. After a drop from 58,213 MT in MY 2019/20 to 8,105 MT recorded from July to November 2025. This reduction could be attributed to shifting demand, trade barriers, or increased competition from other suppliers.

Japan's imports of Brazilian orange juice have steadily decreased over the period. Brazil exported 39,009 MT in MY 2019/20 and decreased to 4,161 MT recorded from July to November 2025. This consistent decline reflects reduced demand and competition from alternative products.

Chile is a relatively minor market for Brazilian orange juice, with gradually decreasing exports from 4,852 MT in MY 2019/20 to a partial 1,201 as of July 2025. While Chile remains a consistent partner, its share of Brazil's total orange juice exports is small.

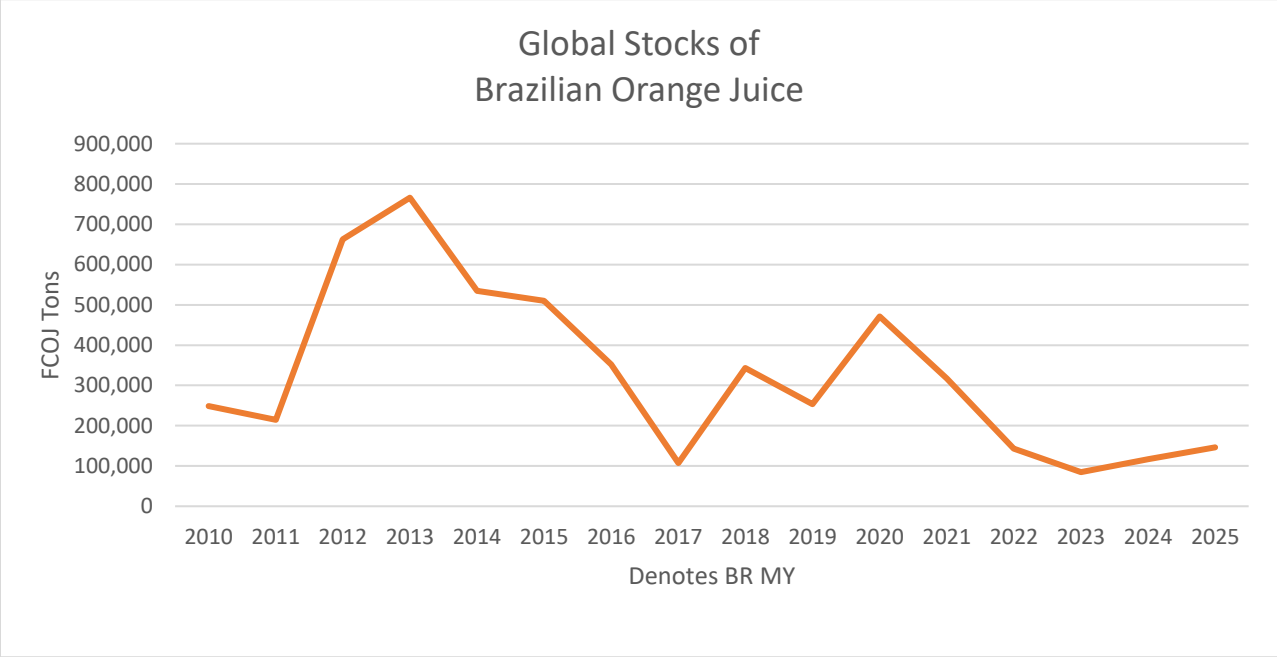
Imports

Brazil does not import orange juice.

Stocks

Global orange juice stocks remain low.

Figure 14
Global Stocks of Brazilian Orange Juice



Source: Citrus BR data, chart by FAS Brasilia

Global stocks of Brazilian orange juice compiled by CitrusBR rose 25.4 percent in June 2025 compared to the previous year, reaching 146,300 tons of FCOJ at 66° Brix. Despite this increase, stocks remain among the lowest in historical records, reflecting restricted supply and continued pressure on the international market.

Attachments:

No Attachments