



11-13 March 2025

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CGA Citrus Summit

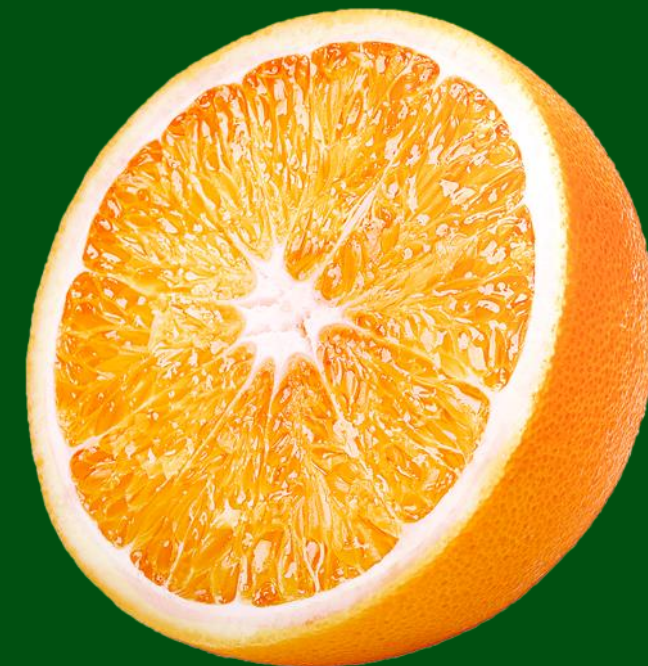
TOUGH TIMES DON'T LAST, TOUGH PEOPLE DO

Citrus Processing & Market

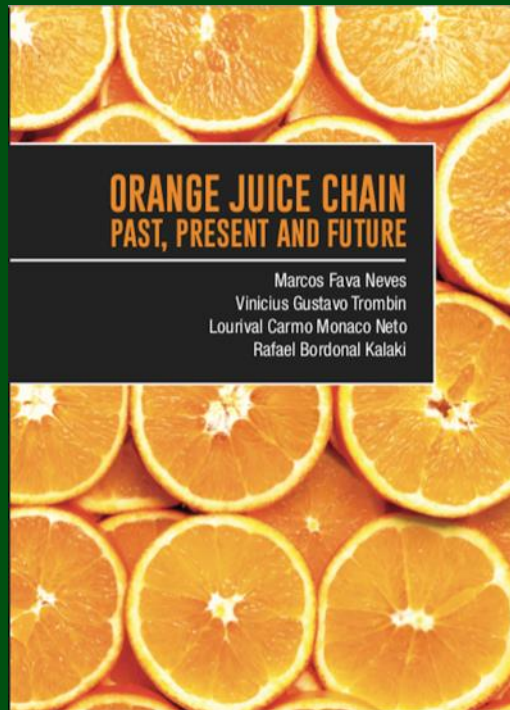
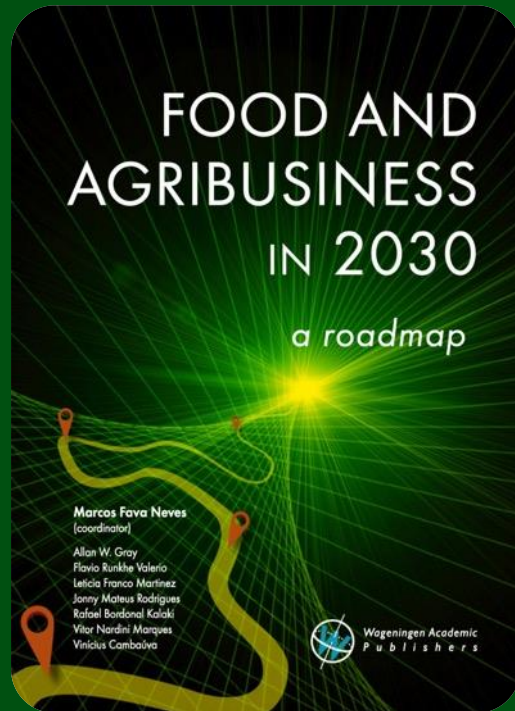
Prof. PhD. Marcos Fava Neves

Business School: University of São Paulo (USP) at Ribeirão Preto – since 1995
Center for Agricultural Business: Purdue University (Indiana/USA) – since 2013
Founder of Markestrat Projects (www.markestrat.com.br) in 2004
Founder of DoutorAgro Knowledge Platform (www.doutoragro.com) in 2014
Founder of Harven Agribusiness School (www.harven.com) in 2024
Specialist in Agribusiness Strategic Planning

www.doutoragro.com



AGENDA



01 Incredible Changes in the World

02 What to Expect from 2025-2030?

03 The Future of the Citrus Industry

04 How Farmers Win?



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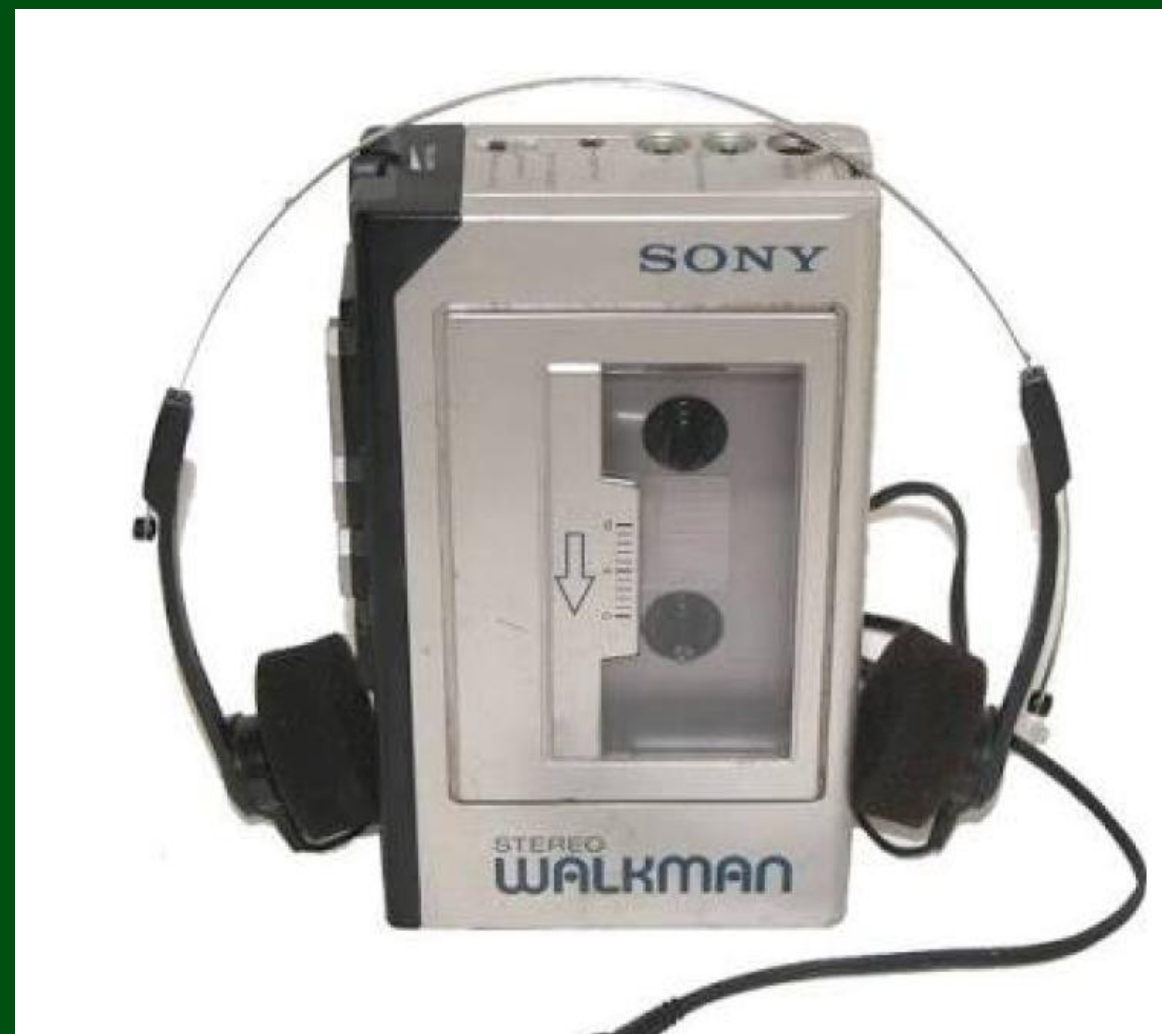


First, let's create some emotions to wake you up!





Source: Prof. Marcos Fava Neves.



Source: Prof. Marcos Fava Neves.



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TOUGH TIMES DON'T LAST, TOUGH PEOPLE DO



**Look how much change
has happened **in the last
30 years...****








Home / Farmers

MEET YOUR FARMER

GET TO KNOW THE FARMERS BEHIND FARMER FOCUS

Enter Farm ID *









Home / Farmers / Jeff & Daphne DINGES

FARM ID: DING, DIN2, DIN4

JEFF & DAPHNE DINGES



Traceability in the Brazilian Cotton Chain

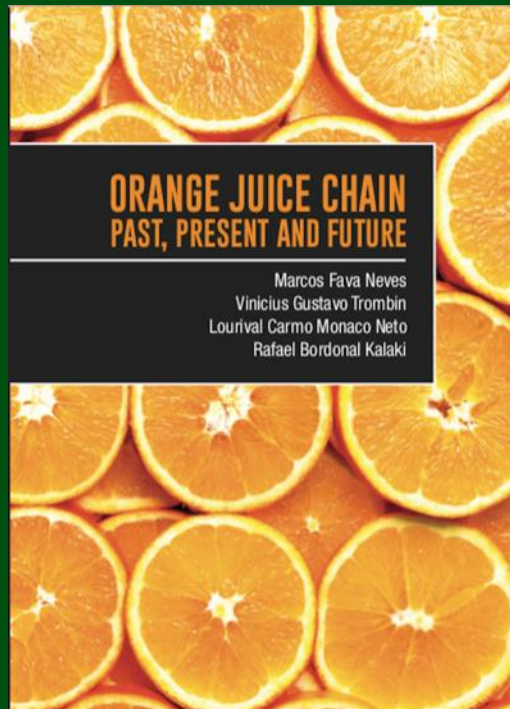
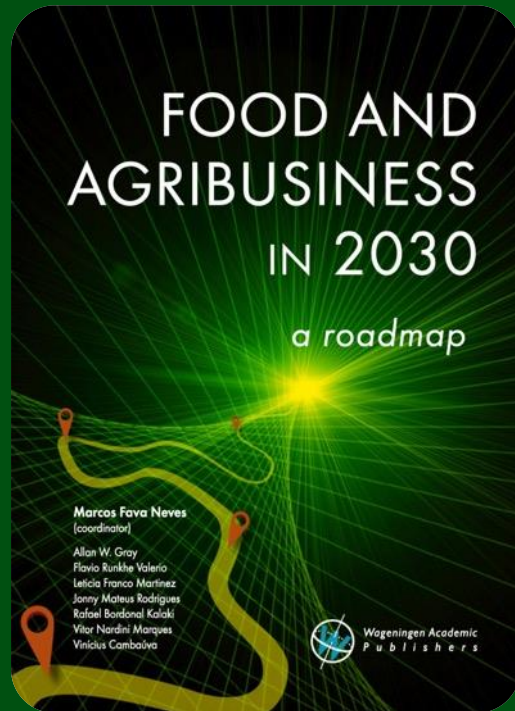
The image displays six screenshots of the Almagrino mobile application, illustrating the traceability of cotton products through various stages of the supply chain. Each screen features the Almagrino logo at the top and a green button at the bottom indicating the current stage.

- 1. Fazenda (Farmer):** Shows the selection of visualization (Visualização por fazenda) and the search for location (Buscar localização). It lists the producer as Alexandre Pedro Schenkel and the farm as Santa Rosa V.
- 2. Fiação (Wiring):** Displays a story about Idécio Schenkel and his family's dream of producing cotton in Mato Grosso. It includes a photo of a cotton field and a link to view more.
- 3. Fio Puro (Wiring):** Provides details about Fio Puro, including the company name, address (Pomerode / SC), website, and a link to view more.
- 4. Confecção (Manufacturing):** Shows the JACE Confecções logo and details about the company, including the address (Agrolândia / SC), website, and a link to view more.
- 5. Varejista (Retailer):** Displays the Almagrino logo and details about the company, including the address (Cuiabá / MT), website, product (Camiseta Polo Mark Gold), lot (141), and a link to view more.
- 6. Weaving:** Shows the DALILA logo and details about the company, including the address (Jaraguá Do Sul / SC), website, and a link to view more.

Source: Prof. Marcos Fava Neves based on Almagrino.



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Can we summarize the scenario in one image?

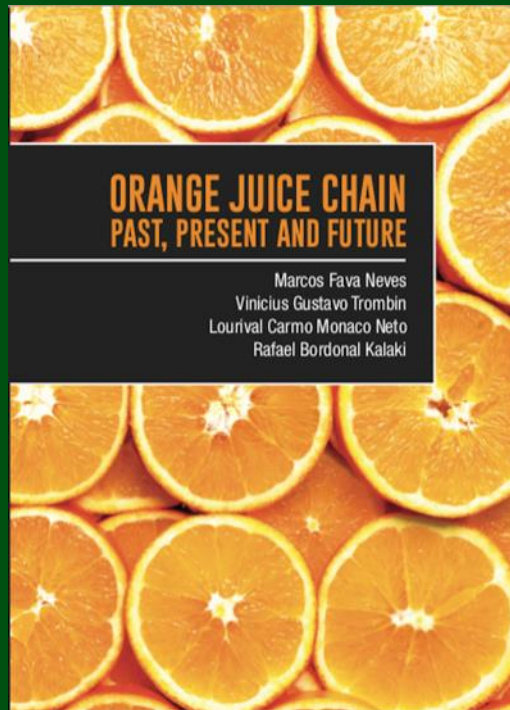
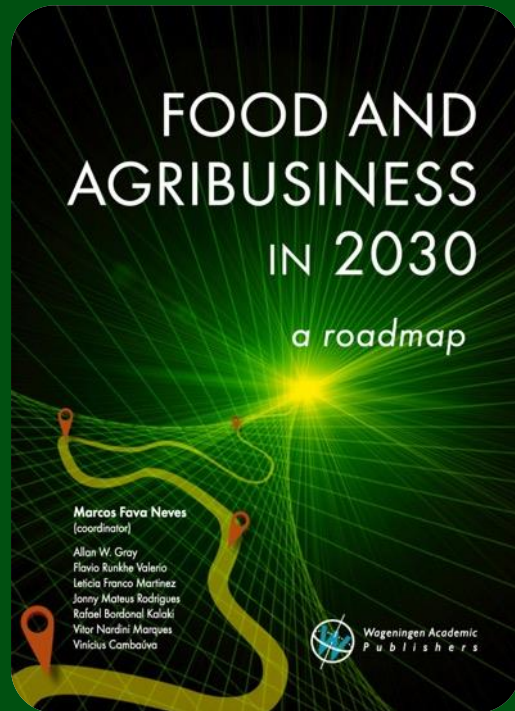


What to Expect for 2025/2030?



Source: Prof. Marcos Fava Neves

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Citrus and orange juice & the media?



Orange juice squeezed by brazilian drought

Futures prices are almost three times above those of two years ago as crop disease hits yields

Brazil is almost alone in producing fruit mostly for the juice market © Bloomberg



Orange juice prices have skyrocketed to all-time highs as severe drought and widespread crop disease have crushed yields in Brazil, the world's top exporter, leaving soft-drink companies facing a "dire" situation.

Concentrated orange juice futures traded on Intercontinental Exchange in New York hit \$4.92 a pound on Friday, almost three times higher than prices two years ago, as global supplies of the fruit for juicing plummet.

For soft-drink companies, which use the futures market to try to hedge against big price moves and are having to stomach the higher costs, the situation is "extremely dire", said Harry Campbell, analyst at Expana. "They're just like 'we don't even know what to do.'"

In May, citrus growers and juice firms association Fundecitrus based in the orange-growing state of São Paulo forecast that Brazil would produce its smallest crop in 35 years, saying yields would be down almost 25 per cent from last year.

But now "even that quite pessimistic forecast probably won't be achieved, given the conditions we're seeing", said Andrés Padilla, an analyst at Rabobank.

Orange juice futures soar to record highs
ICE-US FCOJ futures (cents per lb)



Source: LSEG

Why orange juice has never been more expensive

Pity those who rely on the breakfast staple

Photograph: Getty Images



Mimosas have a simple recipe: one part champagne, one part orange juice. Soon, though, the tippable may be even less affordable—and not because sparkling wine is ever more expensive. Concentrate orange-juice futures in New York, which soft-drink producers use to hedge against price swings, have quadrupled since late 2021. They hit an intraday high of \$5.80 a pound on September 9th, their fifth record in a week.

The problem is that the market for oranges to make concentrate is very concentrated. Growth of the fruit in Florida, once the world's second-biggest producer, has wilted by 92% in the past 20 years after being hit by pests, hurricanes and rising costs. Other growers, such as Mexico and Spain,

largely supply the fresh-fruit market. That leaves Brazil, which accounts for 70% of the world's production and a similar share of exports. And now it, too, is in trouble.

At the start of the year the market already faced bitter prospects. After yet another cataclysmic harvest in Florida—the worst since before the second world war—global stocks looked bare. Then, in May, growers from São Paulo, Brazil's main orange-producing state, forecast that the year's crop would fall by 24% compared with the year before, after an ultra-hot flowering season. Farmers also faced a resurgence in citrus greening, an untreatable bacterial disease that turns oranges sour before killing the tree.



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How was the production of orange juice in the last 20 years?



World Orange Production (million boxes 40,8 kg)

Year	Brazil	USA	China	EU 27	South Africa	World
1994/95	399	264	40	138	19	1237
2004/05	394	217	104	142	25	1487
2014/15	436	147	162	146	42	1206
2024/25	317	63	187	134	40	1025

Orange for Juice Production (million boxes 40,8 kg)

Year	Brazil	USA	China	EU 27	South Africa	World
1994/95	248	207	2	32	1	545
2004/05	339	158	1	44	2	596
2014/15	281	102	16	34	2	497
2024/25	229	24	16	16	3	350

World Orange Juice Production (million tons)

Year	Brazil	USA	China	EU 27	World
1994/95	1056	869	6	100	545
2004/05	1360	691	2	110	596
2014/15	1168	425	50	107	497
2024/25	820	86	18	47	350

(C)

Inventories at the lowest level



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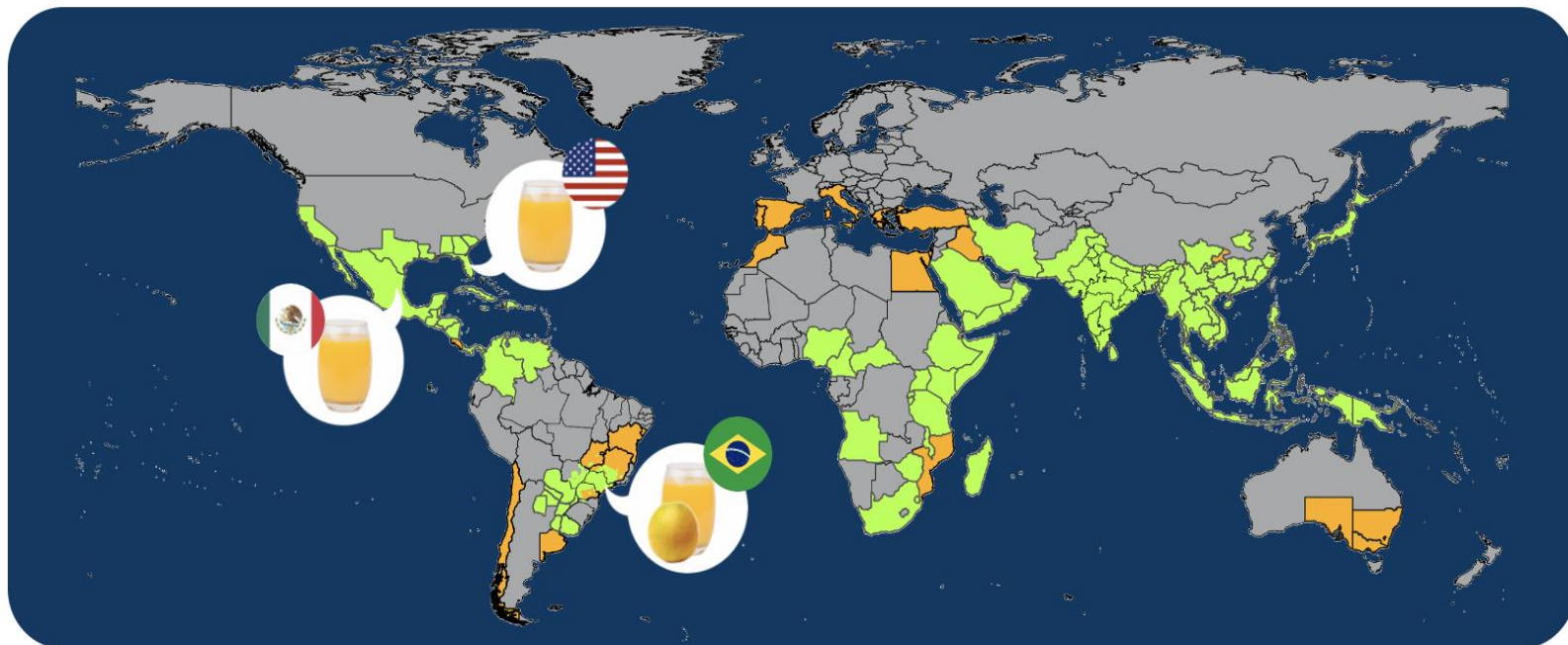
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Why this happened?



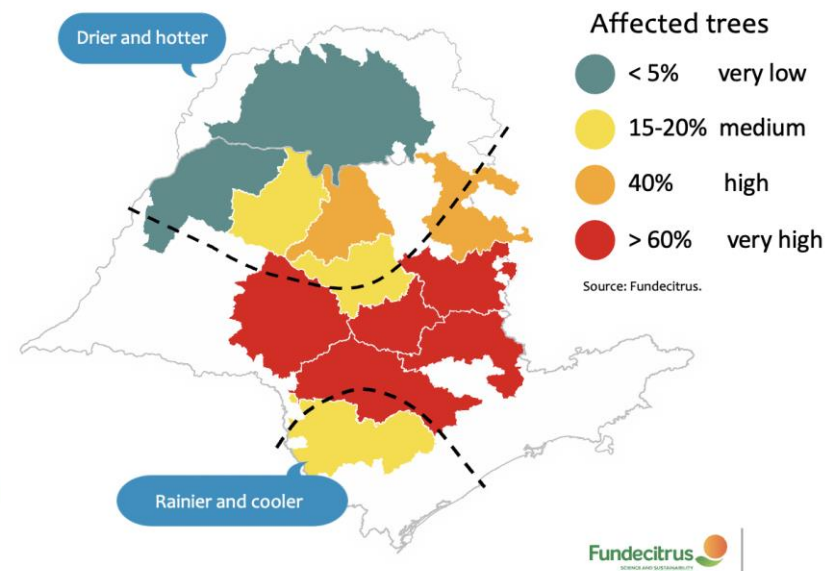
Where Greening Was Detected?



- **Greening detected**
- **Greening not detected yet**

How Fundecitrus recommend the combat: Selection of isolated areas; External management; Inspection and removal of affected trees; Area-wide psyllid monitoring and control; Enhanced vector control in the border of the farm; Flushing-oriented vector control; Kaolin sprays in young groves

Brazil's Infection Rate



Crop in Brazilian Citrus Belt: 228,52 million boxes

Unfavorable weather: high temperature and water deficit

Rainfed



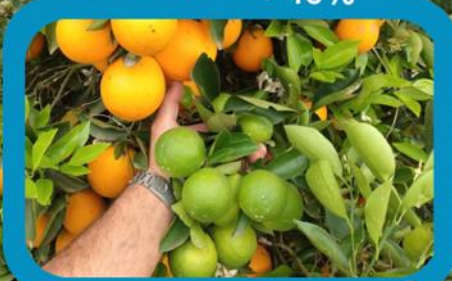
Central region
September 2024



4 °C higher
31% less rain
Since Sept/23 until now



Irrigated
>40%



South region
September 2024



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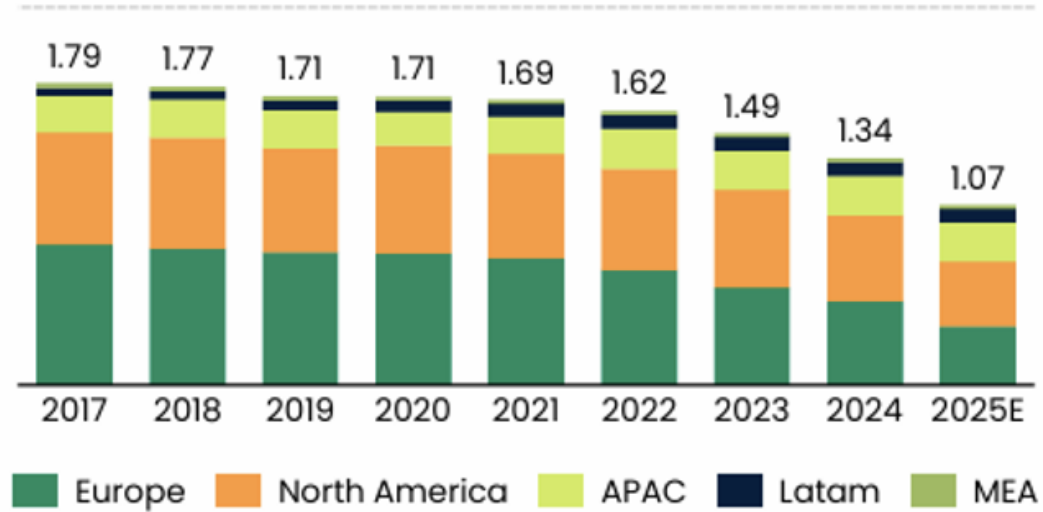


What is going on with juice demand by consumers?

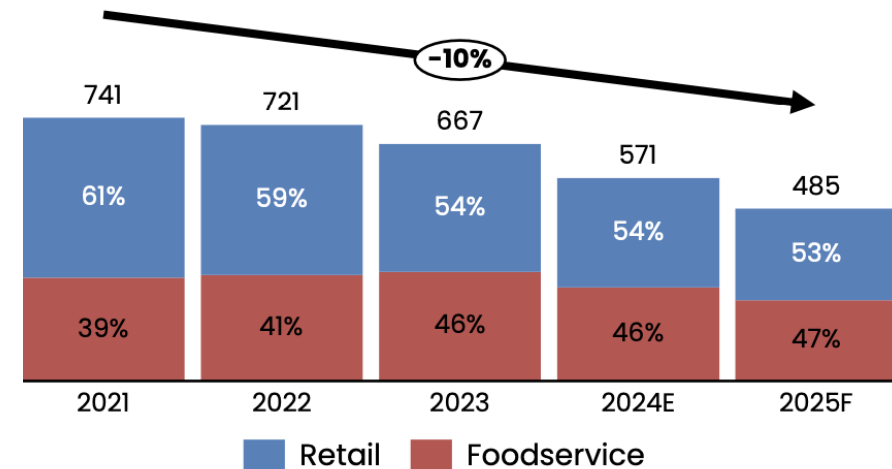


Consumption Declining...

Global OJ Demand (M Tons FCOJ eq.)



US OJ market (M Gals)





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What can we take home from the Citrus Industry?



The Citrus Industry at Crossroads!

1- Florida: devastating effects of greening, hurricanes and urbanization. Huge idle capacity, since it produces 10% of 2 decades ago!

2- São Paulo: damaged by severe weather conditions due to global warming and the expansion of greening. Industry and logistics operating with 47% capacity. Expansion into non-traditional growing regions.

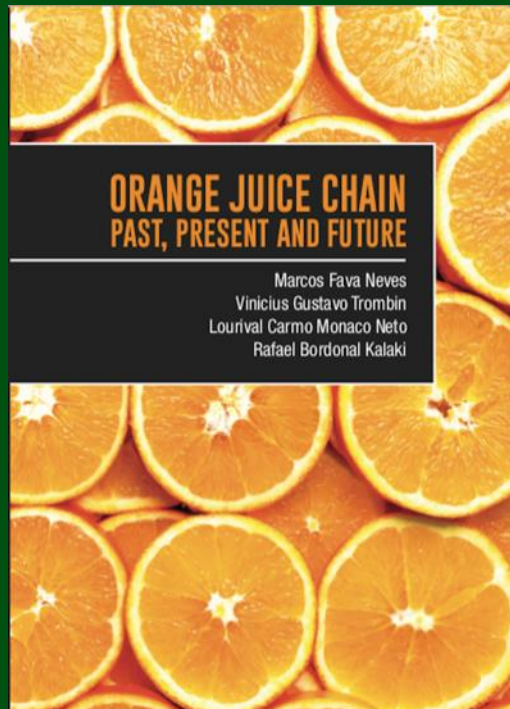
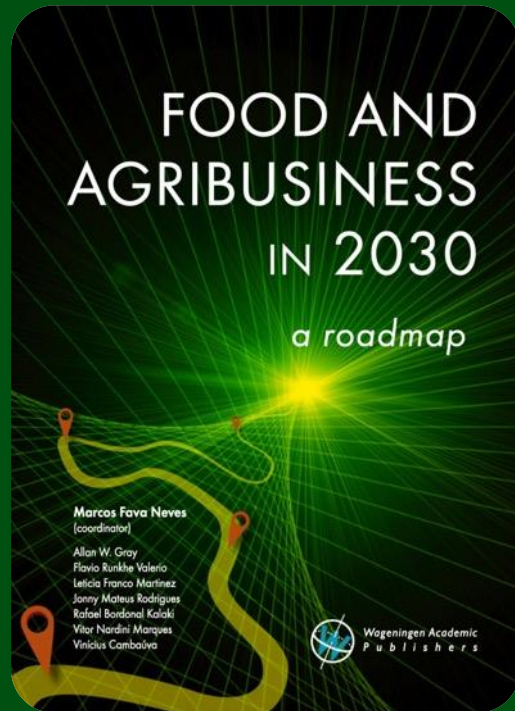
3- The Mexican industry is unable to fill the void, while the Spanish, Brazilian Northeast, and Egyptian incipient industries are highly dependent on the fresh-fruit pull effect

4- Structural decline/leakage in OJ consumption to other non-alcoholic beverages has accelerated again due to current record prices

5 – Consumers: lack of clarity about nutritional benefits, insufficient marketing spend. High prices of juice, capacity underutilization: tremendous financial disruption to bottlers and a risk to lose shelf space.



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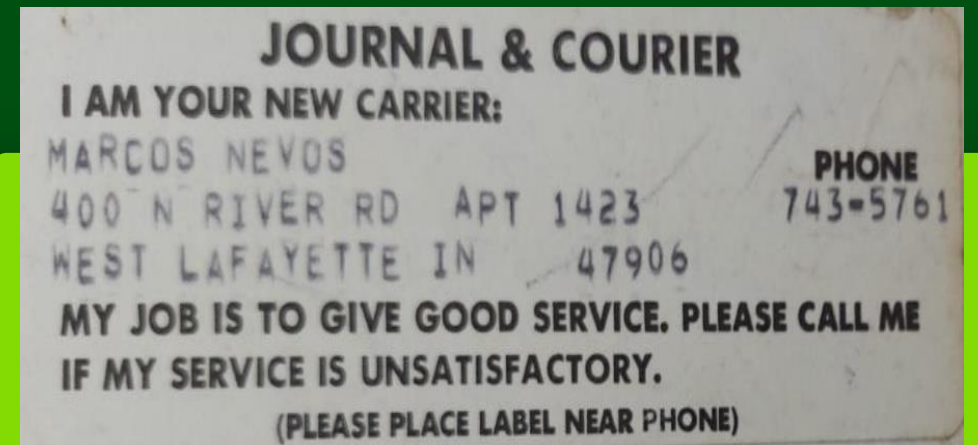
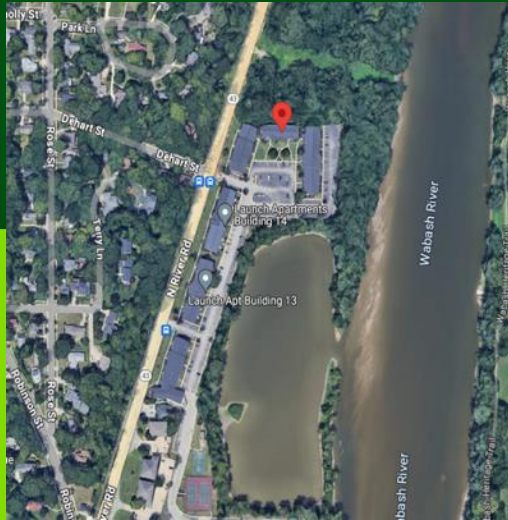
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To conclude, **how can we win** in this scenario?



The Beginning Had a Lot of Work: 1977/78





**Let's finish with the 10
last minutes bringing
10 points to win in
agriculture
2025-2050?**

10. Espírito Coletivista

9. Imagem e Comunicação

8. Liderar/Formar Pessoas

7. Obsessão nos Controles

6. Excelência Ambiental

Doutor
Agro



**10 POINTS TO WIN IN
AGRICULTURE
2025/50**

1. Financial Management

2. Momentos Compra/Venda

3. Escolha das Culturas

4. Excelência Operacional

5. Espírito Inovador

1. Financial Management

- **Cash flows;**
- **Build Options;**
- **Smart investment decisions;**

- ***Get better before getting bigger;***
- ***Get better before getting bigger;***
- ***Get better before getting bigger;***
- ***Get better before getting bigger;***
- ***Get better before getting bigger;***
- ***Get better before getting bigger;***



10. Espírito Coletivista

9. Imagem e Comunicação

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6. Excelência Ambiental

Doutor
Agro



**10 POINTS TO WIN IN
AGRICULTURE
2025/50**

1. Financial Management

2. Moments to Buy and Sell

3. Escolha das Culturas

4. Excelência Operacional

5. Espírito Inovador

2. Moments to Buy and Sell



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1. Financial Management

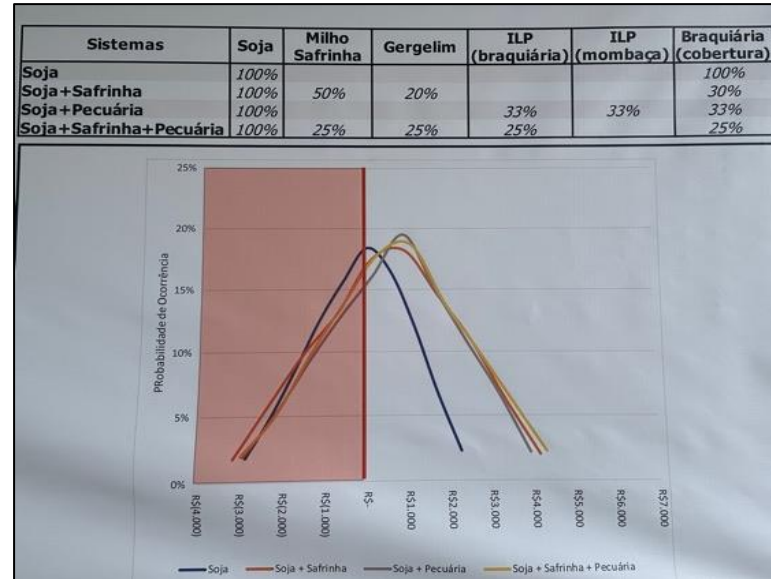
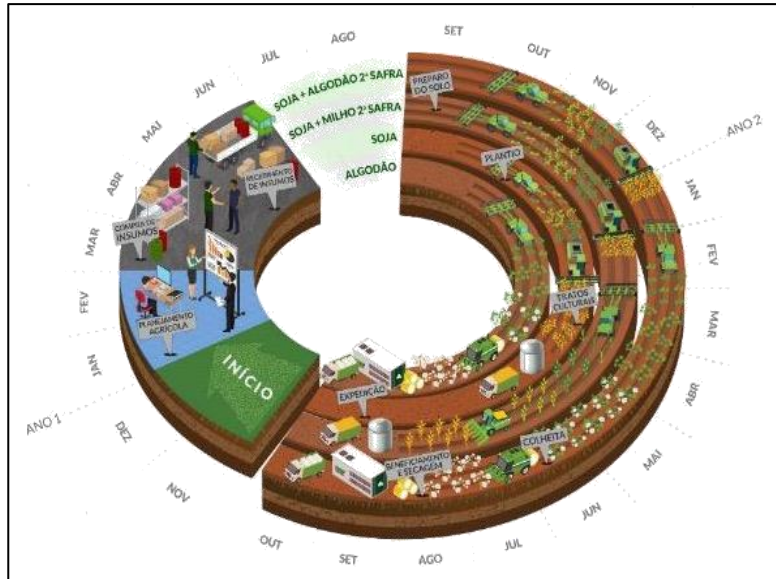
2. Moments to Buy and Sell

3. Choosing the Crops

4. Excelência Operacional

5. Espírito Inovador

3. Choosing the Crops



Milho BT 2023-24		R\$/saca			
		R\$ 40	R\$ 50	R\$ 60	R\$ 70
Produtividade	4800	R\$ -448	R\$ 352	R\$ 1152	R\$ 1952
	5400	R\$ -265	R\$ 635	R\$ 1535	R\$ 2435
	6000	R\$ -260	R\$ 740	R\$ 1740	R\$ 2740

Milho Waxy 2023-24		R\$/saca			
		R\$ 68	R\$ 72	R\$ 76	R\$ 80
Produtividade	3900	R\$ 720	R\$ 980	R\$ 1.240	R\$ 1.500
	4350	R\$ 1.130	R\$ 1.420	R\$ 1.710	R\$ 2.000
	4800	R\$ 1.540	R\$ 1.860	R\$ 2.180	R\$ 2.500

Gergelim 2023-24		R\$/saca			
		R\$ 180	R\$ 220	R\$ 260	R\$ 300
Produtividade	450	R\$ 150	R\$ 450	R\$ 750	R\$ 1.050
	550	R\$ 250	R\$ 617	R\$ 983	R\$ 1.350
	650	R\$ 350	R\$ 783	R\$ 1.217	R\$ 1.650



10. Espírito Coletivista

9. Imagem e Comunicação

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Agro



**10 POINTS TO WIN IN
AGRICULTURE
2025/50**

1. Financial Management

2. Moments to Buy and Sell

3. Choosing the Crops

4. Operational Excellence

5. Espírito Inovador

Operational Excellence

- **Eye of the owner**
- **Square meter management**
- **Never satisfied, always Looking to how to improve**



10. Espírito Coletivista

9. Imagem e Comunicação

8. Liderar/Formar Pessoas

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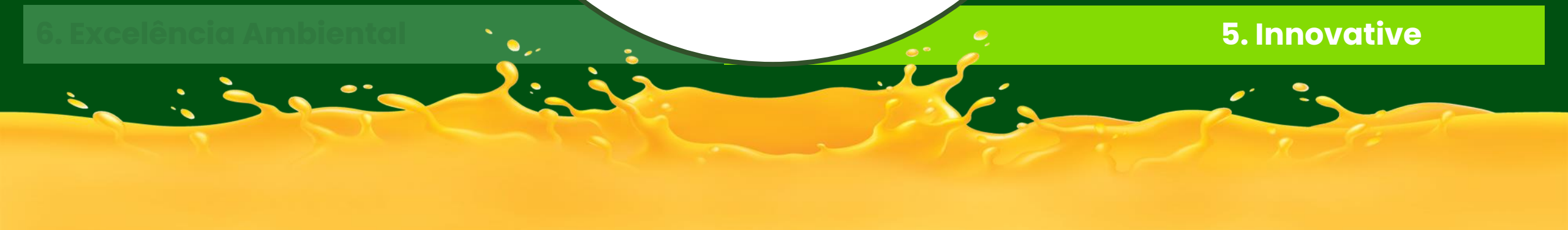
1. Financial Management

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3. Choosing the Crops

4. Operational Excellence

5. Innovative



Grove of the Future

Farm border

Large and squared blocks



Circular Agriculture



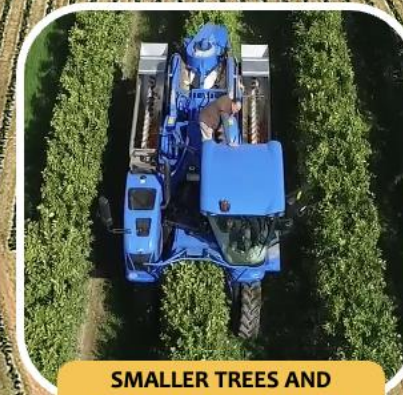
BIOLOGICAL CONTROL



INSECTICIDE



Irrigation



**SMALLER TREES AND
MECHANICAL HARVEST**



**PLANT IMPROVEMENT BY
MODERN BREEDING
TECHNOLOGIES**

10. Espírito Coletivista

9. Imagem e Comunicação

8. Liderar/Formar Pessoas

7. Obsessão nos Controles

6. Environmental Excellence

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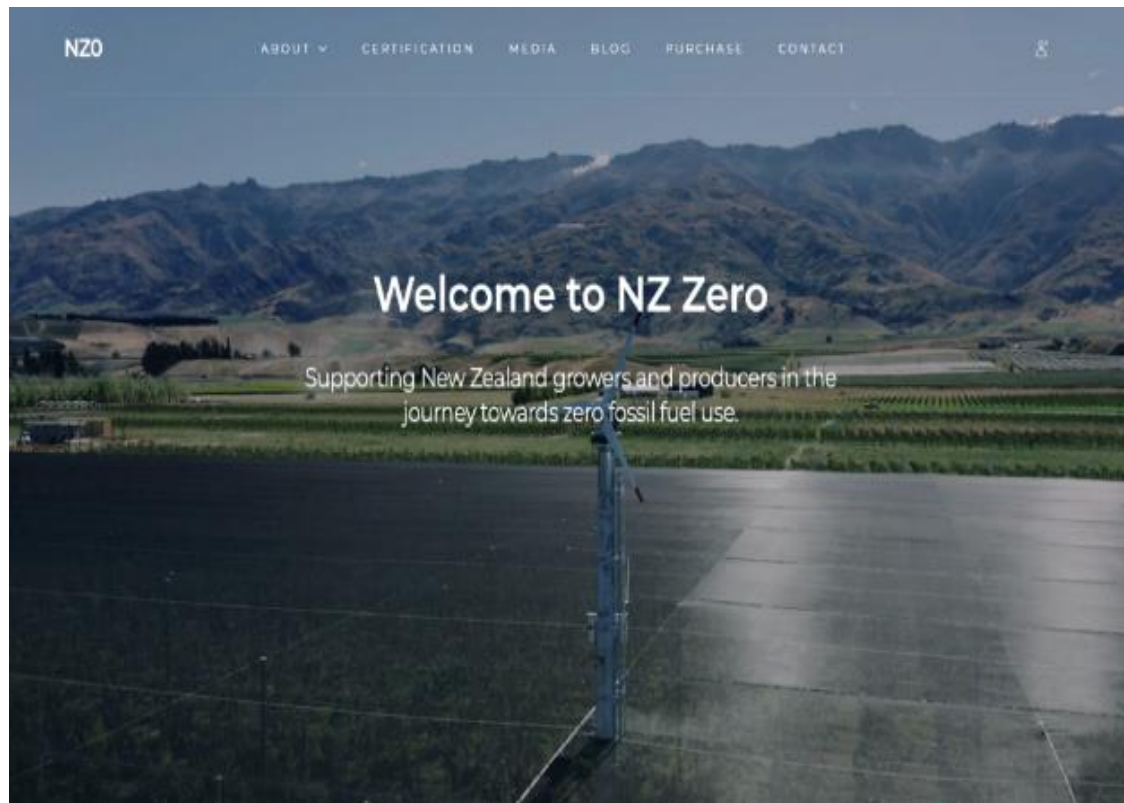
3. Choosing the Crops

4. Operational Excellence

5. Innovative



6. Environmental Excellence



10. Espírito Coletivista

9. Imagem e Comunicação

8. Liderar/Formar Pessoas

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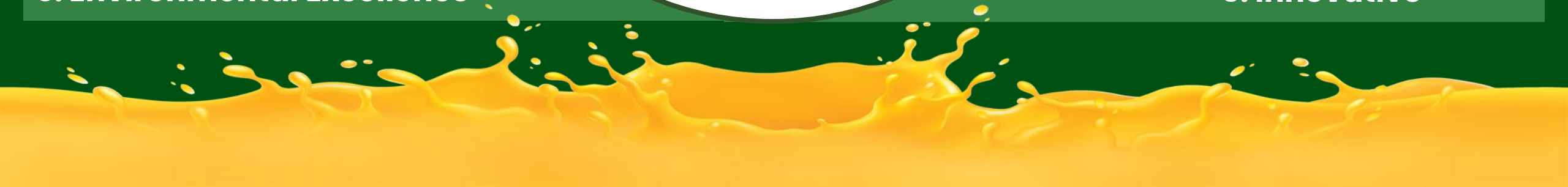
1. Financial Management

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3. Choosing the Crops

4. Operational Excellence

5. Innovative



7. Obsession in Controls

- **Data collection and management;**
- **All details matter;**
- **Don't falls on urgency traps;**
- **Cost controls inspiring all the team!**



10. Espírito Coletivista

9. Imagem e Comunicação

8. Leadership and people

7. Obsession in Controls

6. Environmental Excellence

Doutor
Agro



**10 POINTS TO WIN IN
AGRICULTURE
2025/50**

1. Financial Management

2. Moments to Buy and Sell

3. Choosing the Crops

4. Operational Excellence

5. Innovative

8. Leadership and People

- Inspiring people;
- Buiding talents;
- Sucession at the farm, company and family;
- Builds teams;
- Share results;



10. Espírito Coletivista

9. Image & Communication

8. Leadership and People

7. Obsession in Controls

6. Environmental Excellence

1. Financial Management

2. Moments to Buy and Sell

3. Choosing the Crops

4. Operational Excellence

5. Innovative

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**10 POINTS TO WIN IN
AGRICULTURE 2025/50**

Image & Communication



10. Collectivist Spirit

9. Image & Communication

8. Leadership and People

7. Obsession in Controls

6. Environmental Excellence

**Doutor
Agro**



**10 POINTS TO WIN IN
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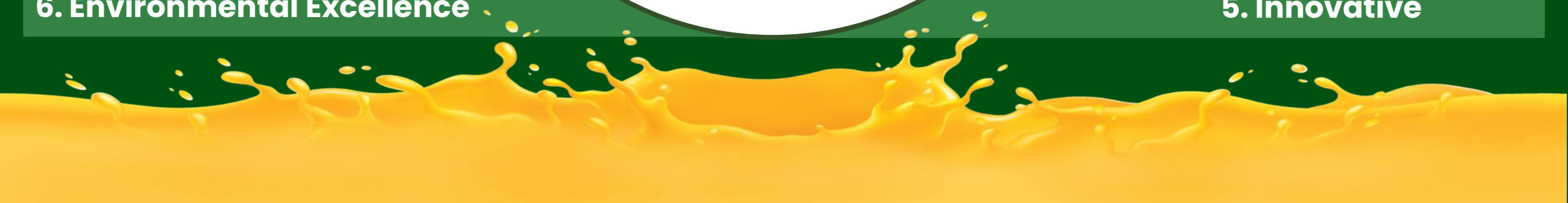
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5. Innovative



Almería Region, Spain

Global Case on Protected Cultivation



15,000

small
farmers

US\$ 6 billion

of annual
sales revenue

62,000

hectares, 32 thousand
of which are
greenhouses

US\$ 4 billion

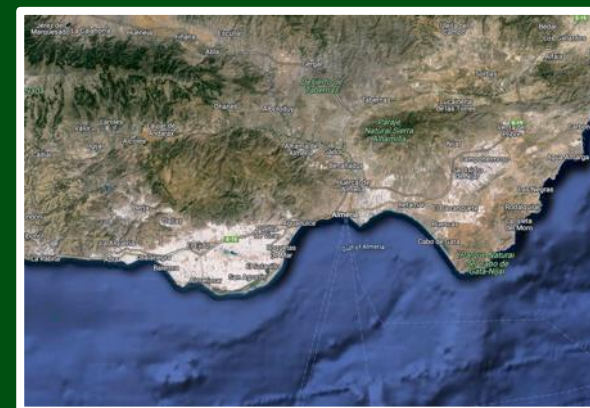
in annual exports of the
region's products

3,7 million

tons of fruit and
vegetable produced
annually

100,000

jobs generated
between direct and
indirect



Collective Actions



**Did you prepare a
picture to facilitate
our home work?**



10. Collectivist Spirit

Work for the collective actions of agriculture, participate in associations, syndicates...

9. Image & Communication

Social media to communicate, active behavior, building the image of agriculture

8. Leadership and People

Inspiring, leadership, building talents, succession and share results

7. Obsession in Controls

Collects all data, compares, details matter and cost culture

6. Environmental Excellence

Carbon markets, environmental legislation and opportunities

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10 POINTS TO WIN IN AGRICULTURE 2025/50



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TOUGH TIMES DON'T LAST, TOUGH PEOPLE DO

1. Financial Management

Cash, get better before getting bigger

2. Moments to Buy and Sell

Study the market and exchange ratios

3. Choosing the Crops

Doing the best choices to maximize returns and soil regeneration and management

4. Operational Excellence

Use of technology, efficiency, managing by square meter

5. Innovative

Biologicals, bioinputs, circular agriculture, regenerative agriculture, be in events, learn and try

Thank You!

Prof. PhD. Marcos Fava Neves

Professor at FEA/RP – USP

Professor at Purdue University (USA)

Professor at University of Buenos Aires (FAUBA)

Creator of Harven Agribusiness School (2023)

Creator of Markestrat (2004) and DoutorAgro (2014)

www.doutoragro.com

