California CITRUS MUTUAL

Volume 48, NO. 34 **Market Memo** **August 21, 2025**

Disclaimer: *The navel prices listed below are reported to CCM from various industry representatives each week. The lemon and grapefruit prices are pulled from USDA and reflect the spot market price. Both data sets represent a range of prices that are then calculated into an average. Growers should consult their packing houses if they have specific questions about the price their fruit is receiving.*

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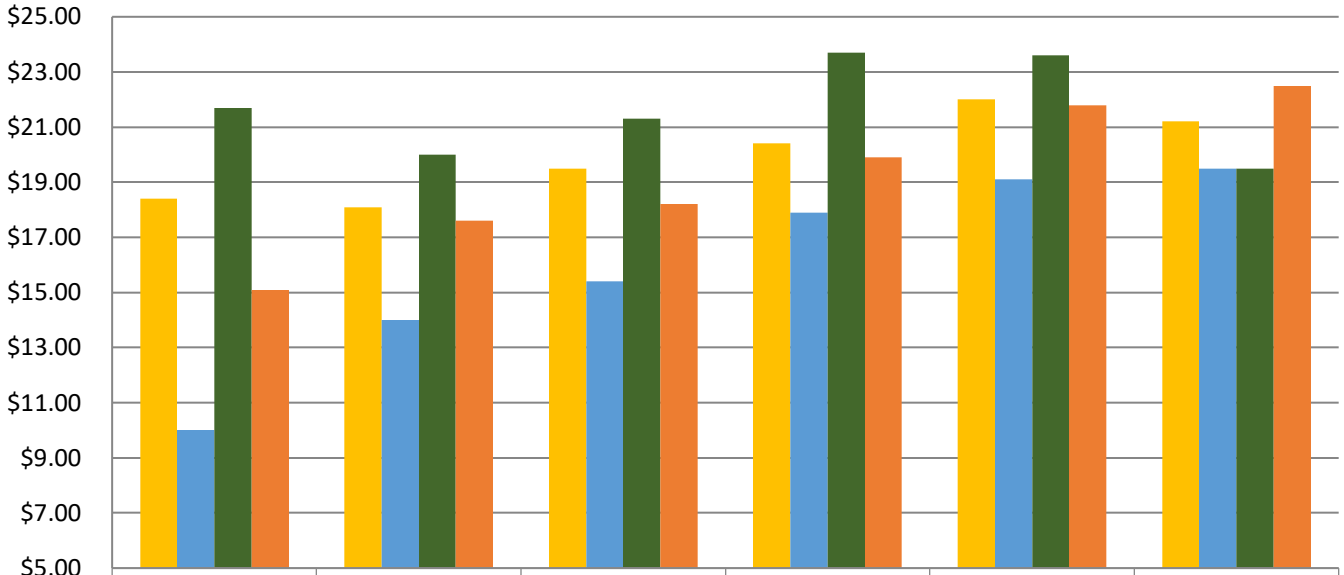
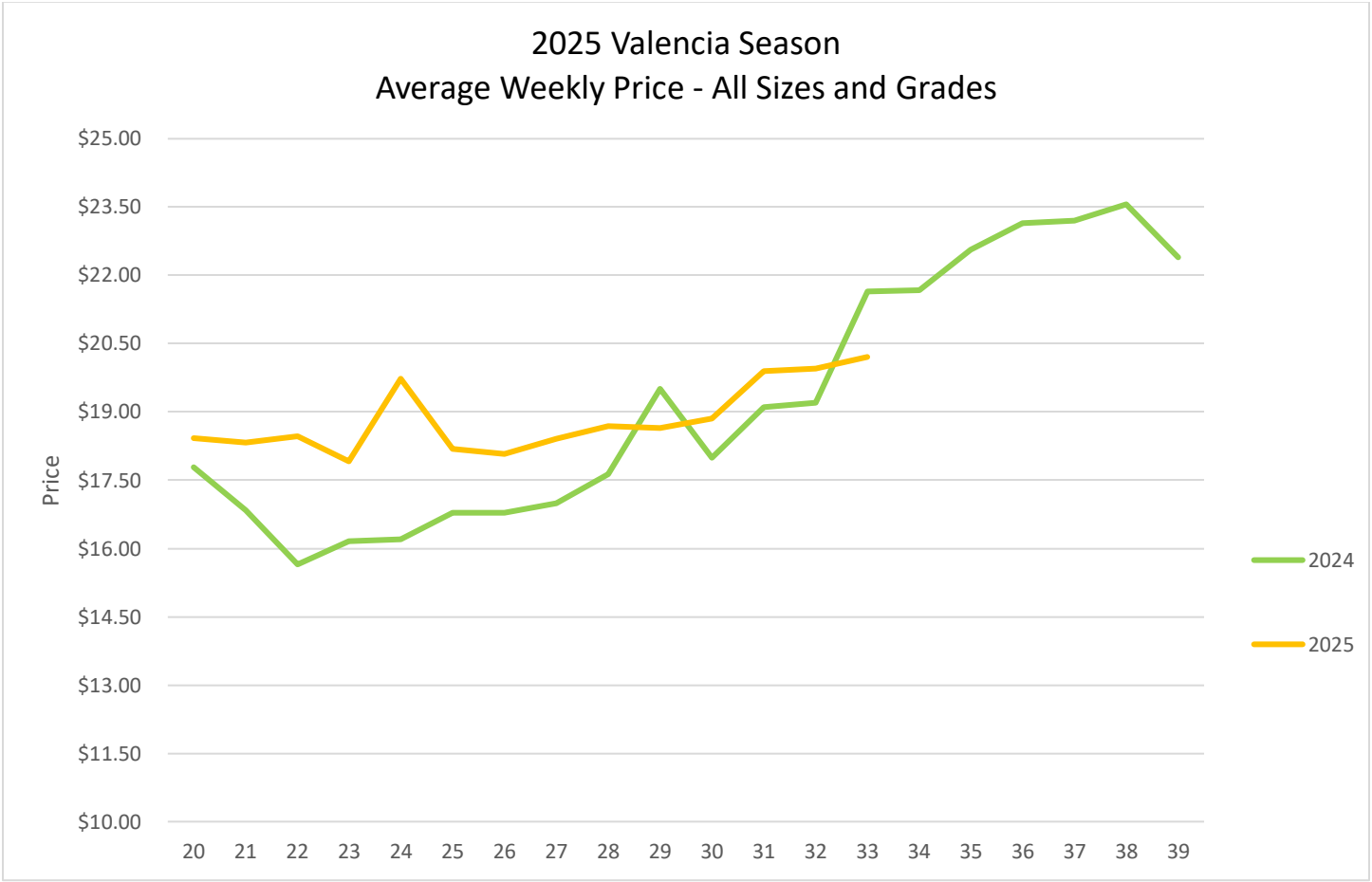
Valencias – Vals are over 50% harvested and moving well. Due to the late start of the season, the industry is further behind schedule than usual but should finish strong. We're benefiting from a smaller supply of imports. Prices have been good and continue to climb for small fruit. Peak sizes were 88 followed by 113 and 72. Utilization is decent at 77%.

Valencia Average Prices by Week							
Week #:	33		32		***Change in Price***		*Peak Sizes*
Week Ending:	8/16/2025		8/9/2025				
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***	
48	15.90	13.10	16.60	12.80	**-4%**	**2%**	1%
56	18.30	16.00	18.70	16.40	**-2%**	**-2%**	8%
72	18.00	18.80	19.40	18.70	**-7%**	**1%**	18%
88	20.20	19.20	20.80	19.30	**-3%**	**-1%**	38%
113	22.00	21.30	21.30	20.20	**3%**	**5%**	25%
138	22.80	21.90	22.10	20.90	**3%**	**5%**	9%

Domestic Average Valencia Prices: Week 33



	48	56	72	88	113	138
2022	$18.40	$18.10	$19.50	$20.40	$22.00	$21.20
2023	$10.00	$14.00	$15.40	$17.90	$19.10	$19.50
2024	$21.70	$20.00	$21.30	$23.70	$23.60	$19.50
2025	$15.10	$17.60	$18.20	$19.90	$21.80	$22.50



Week	2024	2025
20	$17.78	$18.43
21	$16.84	$18.33
22	$15.65	$18.47
23	$16.16	$17.91
24	$16.20	$19.72
25	$16.78	$18.19
26	$16.78	$18.08
27	$16.00	$18.41
28	$17.63	$18.69
29	$19.50	$18.65
30	$17.99	$18.85
31	$19.11	$19.90
32	$19.20	$19.95
33	$20.21	$20.21

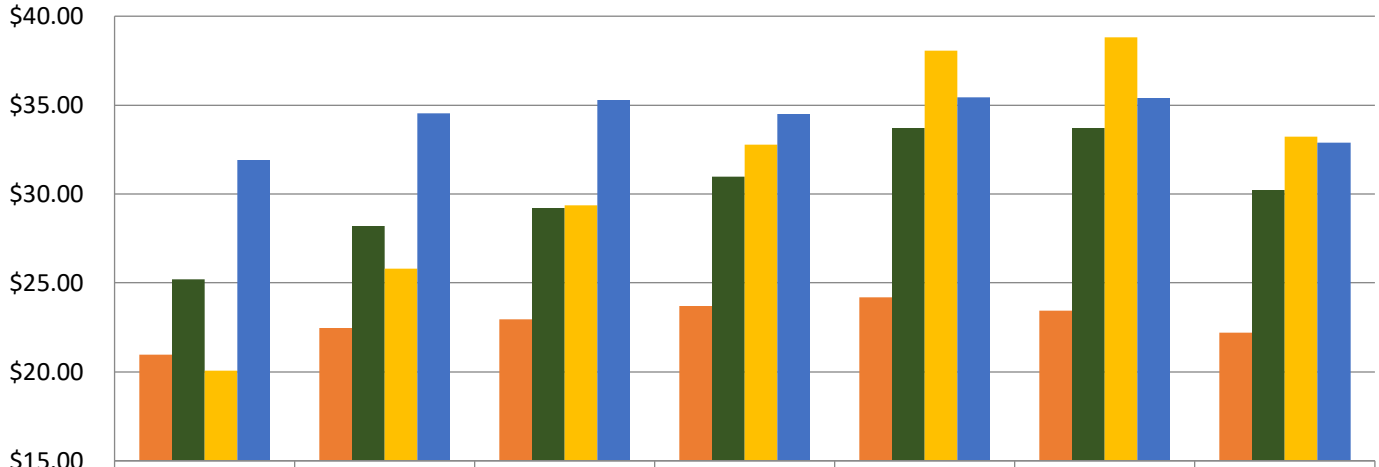
Lemons – D1 and D2 lemons are wrapping up for the season and we're seeing about 10-15% lower supply compared to last year as imports are down. D3 lemons will soon pick up and are projected to see a similar supply to last year. Overall, we've had a good-sized crop with steady prices.

Please see our Lemon Import Report for more details.

**Please note that these lemon prices are from the USDA and include other costs. The prices are used to evaluate trends. They do not reflect the returns growers receive but rather voluntary prices reported to the USDA.*

Lemon Average Prices by Week						
Week #:	33		32		***Change in Price***	
Week Ending:	8/16/2025		8/9/2025			
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***
75	35.83	27.98	35.33	27.98	**1%**	**0%**
95	38.60	30.48	37.78	30.03	**2%**	**1%**
115	38.60	31.98	37.78	30.98	**2%**	**3%**
140	36.70	32.33	36.70	31.85	**0%**	**1%**
165	37.00	33.85	36.70	33.53	**1%**	**1%**
200	36.98	33.85	36.98	33.53	**0%**	**1%**
235	35.00	30.78	35.00	30.15	**0%**	**2%**

Domestic Average Lemon Prices: Week 33 Source: USDA AMS



	75	95	115	140	165	200	235
2021-22	$20.95	$22.45	$22.95	$23.70	$24.20	$23.45	$22.20
2022-23	$25.20	$28.21	$29.21	$30.99	$33.71	$33.71	$30.23
2023-24	$20.06	$25.81	$29.35	$32.79	$38.08	$38.81	$33.24
2024-25	$31.90	$34.54	$35.29	$34.51	$35.43	$35.41	$32.89

Orange Juice

- Futures price as of August 15, 2025, is down from last week at 247 or $2.47 per pound solid.
- Futures price at the start of the Valencia season, on April 15, 2025, was 306 or $3.06 per pound solid.

South Africa Reconsiders Trade Strategies Amid U.S. Tariffs and EU Citrus Dispute

South African citrus exports to the U.S. now face a 30% tariff, following the Trump administration's new tariff regime. In response, Trade Minister Parks Tau announced that South Africa will submit a revised trade proposal to Washington, offering to ease certain agricultural barriers, including sanitary and phytosanitary (SPS) restrictions. The revised offer is intended to show that South African exports are complementary, not threatening, to U.S. industries.

Meanwhile, South Africa continues to challenge the EU's Citrus Black Spot (CBS) and False Codling Moth (FCM) regulations at the WTO, arguing that they are unscientific and discriminatory. According to media reporting, Minister Tau signaled that direct talks with Brussels may resume, as WTO processes are slow and tariffs are reshaping global trade dynamics. The EU remains South Africa's largest citrus export market.

To reduce vulnerability to trade shocks, South Africa is accelerating efforts to diversify markets, with China identified as a priority partner. A five-year plan to boost trade and investment with China was announced last week, aiming to ensure greater stability and predictability in exports.

South Africa is navigating a dual front of trade tensions: protecting its citrus exports to the EU while trying to restore favorable U.S. market access. The outcomes of both negotiations will shape not only the citrus industry but also the broader trajectory of South Africa's agricultural trade.

UPCOMING EVENTS

Citrus Research Board Post-Harvest Conference

The Citrus Research Board (CRB) has announced that registration is open for the Post-Harvest Conference on September 4, 2025, in Visalia, at the Visalia Convention Center. Sponsored by the CRB and organized in partnership with the University of California Agriculture and Natural Resources (UC ANR), this technical one-day citrus conference will provide the most up-to-date information on critical post-harvest disease control and food safety areas.

New this year, the Post-Harvest Conference will feature two panel discussions. A retailer panel will provide attendees with insights and strategies for domestic supply from the perspective of a regional retailer and a large national retailer. A food safety panel will discuss the impact of current regulations and future trends in food safety and answer questions from the audience.

This event targets industry personnel, packinghouse professionals, and service company representatives. Conference schedule, speakers, and registration are available at the link below. Please note that registration closes Friday, August 29, 2025. Please contact Caitlin Stanton at events@citrusresearch.org or call (559) 738-0246 with any questions regarding the conference.

Registration Deadline: August 29, 2025
Registration Fee: $50 per person
Event Schedule and Registration

SAVE THE DATE: CCM Annual Meeting November 5, 2025

Please save the date for our 48th Annual Meeting on Wednesday, November 5, 2025, at the Visalia Convention Center. Guest and sponsor registration opening soon!

IN THE NEWS

- **Farm Bureau: Proposal Would Keep More U.S. Oranges in Juice**

**The news articles shared are for informational purposes only and do not necessarily reflect the views or positions of CCM. They are provided to offer insight into current media coverage and trends affecting the industry.*

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