Volume 48, NO. 50 Market Memo December 11, 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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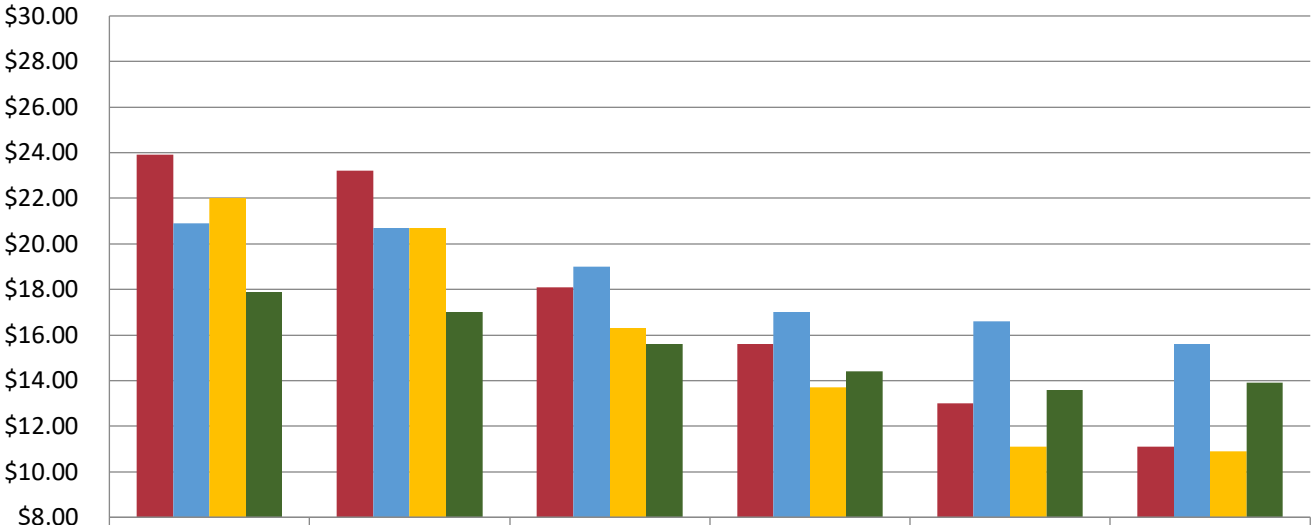
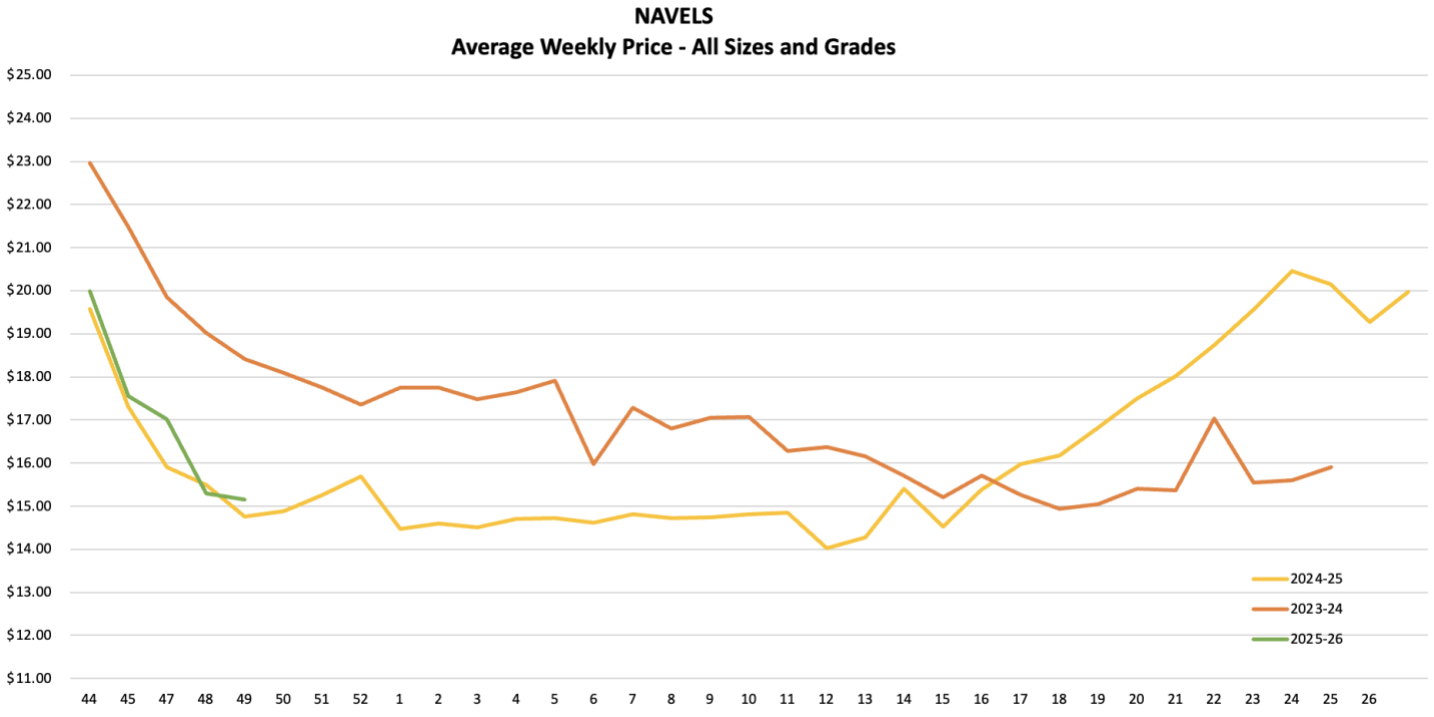
Navels – Navels are around 15% harvested. Fruit quality has been high and fruit sizing has been large for this time of the year. The increased volume of domestic supply, paired with an early abundance of larger fruit, is likely contributing to some of the drops in pricing averages seen below for week 49. Peak sizes were 88s, 72s and 56s. Utilization stood near 75%.

Navel Average Prices by Week							
Week #:	49		48		***Change in Price***		*Peak Sizes*
Week Ending:	12/6/2025		11/29/2025				
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***	
48	19.80	11.70	21.00	11.90	**-6%**	**-2%**	7%
56	18.50	12.30	19.30	12.20	**-4%**	**1%**	16%
72	16.30	13.40	16.50	13.10	**-1%**	**2%**	26%
88	14.70	13.40	15.20	14.30	**-3%**	**-6%**	29%
113	13.70	13.60	13.20	13.90	**4%**	**-2%**	13%
138	13.90	14.10	13.20	15.10	**5%**	**-7%**	5%

Domestic Average Navel Prices: Week 49



	48	56	72	88	113	138
2022-23	$23.90	$23.20	$18.10	$15.60	$13.00	$11.10
2023-24	$20.90	$20.70	$19.00	$17.00	$16.60	$15.60
2024-25	$22.00	$20.70	$16.30	$13.70	$11.10	$10.90
2025-26	$17.90	$17.00	$15.60	$14.40	$13.60	$13.90



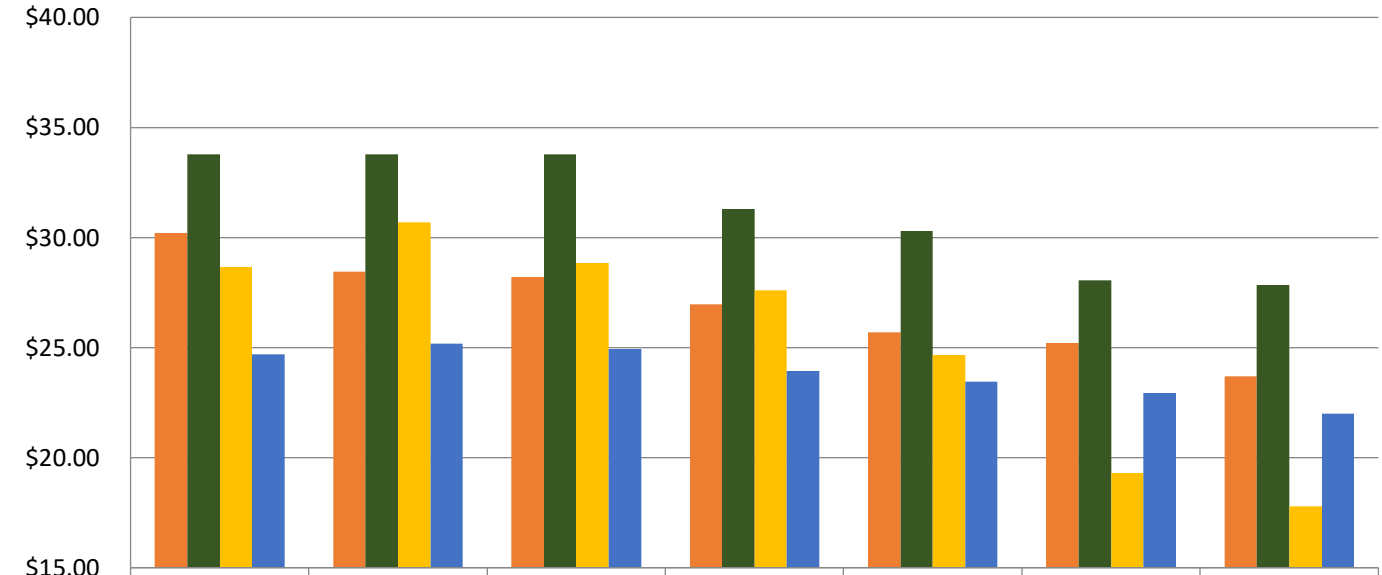
Week	2023-24	2024-25	2025-26
44	$22.96	$19.57	$19.99
45	$21.47	$17.30	$17.56
47	$19.85	$15.90	$17.02
48	$19.02	$15.49	$15.30
49	$18.41	$14.75	$15.15

Lemons – Lemons are around 60% harvested in D3 and 25% harvested in D1. D2 lemon harvesting is beginning to pick back up. Increased volume of domestic supply is likely contributing to recent drops in pricing averages, as seen below for week 49. Overall, we're hearing of good fruit appearance, color and sizing with high internal quality.

**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 #:	49		48		***Change in Price***	
Week Ending:	12/6/2025		11/29/2025			
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***
75	27.73	21.65	28.98	22.53	**-4%**	**-4%**
95	27.73	22.63	28.98	23.63	**-4%**	**-4%**
115	27.23	22.63	28.43	23.15	**-4%**	**-2%**
140	25.45	22.43	28.98	22.95	**-12%**	**-2%**
165	25.45	21.43	26.95	22.95	**-6%**	**-7%**
200	24.43	21.43	25.95	22.95	**-6%**	**-7%**
235	23.00	21.00	25.00	21.53	**-8%**	**-2%**

Domestic Average Lemon Prices: Week 49 Source: USDA AMS



	75	95	115	140	165	200	235
2022-23	$30.20	$28.45	$28.20	$26.95	$25.70	$25.20	$23.70
2023-24	$33.79	$33.79	$33.79	$31.31	$30.31	$28.06	$27.85
2024-25	$28.65	$30.68	$28.85	$27.60	$24.66	$19.29	$17.79
2025-26	$24.69	$25.18	$24.93	$23.94	$23.44	$22.93	$22.00

Orange Juice

- Futures price as of December 5, 2025, is down from last week at 146 or $1.46 per pound solid.
- Futures price around the start of the Navels season, on October 31, 2025, was 169 or $1.69 per pound solid
- Futures price around the start of the Valencia season, on April 15, 2025, was 306 or $3.06 per pound solid

REMINDER: Sign Up to Receive Weather Watch Alerts

With the 2025-2026 frost season in full swing, we want to remind growers that our weather watch program, with daily forecasts for citrus-growing regions, is up and running. If you have not signed up to receive daily alerts and would like to, click here.

Thank you to our sponsors for making this program possible.

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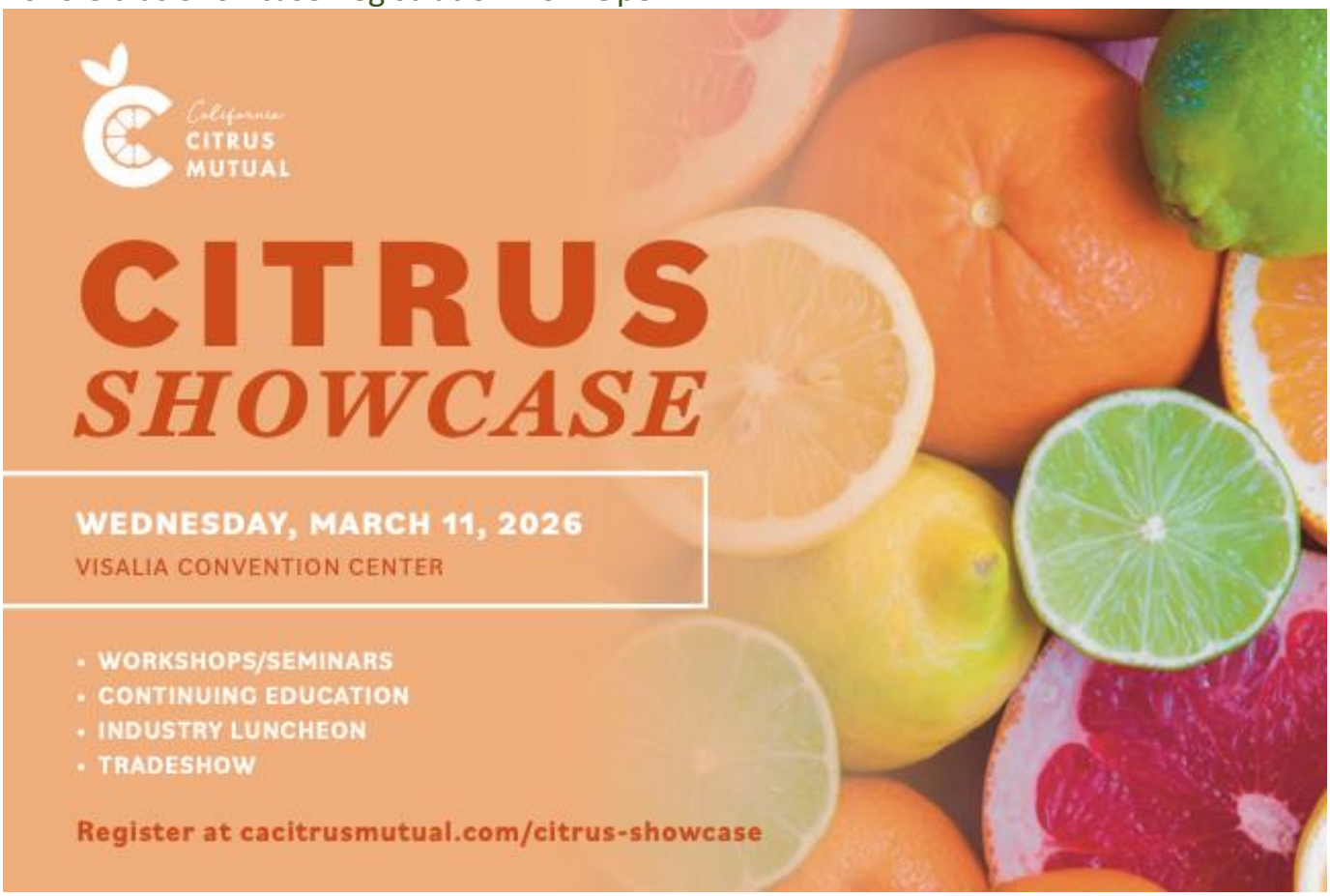
UPCOMING EVENTS

2026 Citrus Showcase Registration Now Open



Exhibitor, sponsor and general attendance registration is NOW OPEN for Citrus Showcase on Wednesday, March 11, 2026, at the Visalia Convention Center! This is California's premier event for citrus growers, offering ample opportunities to expand their knowledge and network through our tradeshow, continuing education sessions and expert seminars – all free of charge to attendees.

Exhibit Booths and Industry Luncheon tickets are selling fast! We highly recommend securing your spot ASAP! Sponsor opportunities are also limited. For general inquiries or questions about sponsorships and/or exhibitor information, please contact Jessica Gravitt at (559)592-3790 or jessica@cacitrusmutual.com.

Register here

Rights and Responsibilities Webinar: Resources for California Employers

In this webinar, learn about the latest in federal and state requirements, employee protections, and worksite readiness for 2026.

Webinar topics will include:

- Recommendations for compliance and readiness
- I-9 audits, worksite enforcement, No-Match letters
- Non-Compliance Consequences
- Proactive Employer Strategies

- Overview of AB 450, including employer obligations and worker protections
- Regulations on verification and worker rights

Webinar Details:

- When: December 17, 2025 | 11:30 AM
- Where: Zoom Webinar
- Register Here

IN THE NEWS

- **Morning Ag Clips: The Orange's Christmas Connection**

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