California CITRUS MUTUAL

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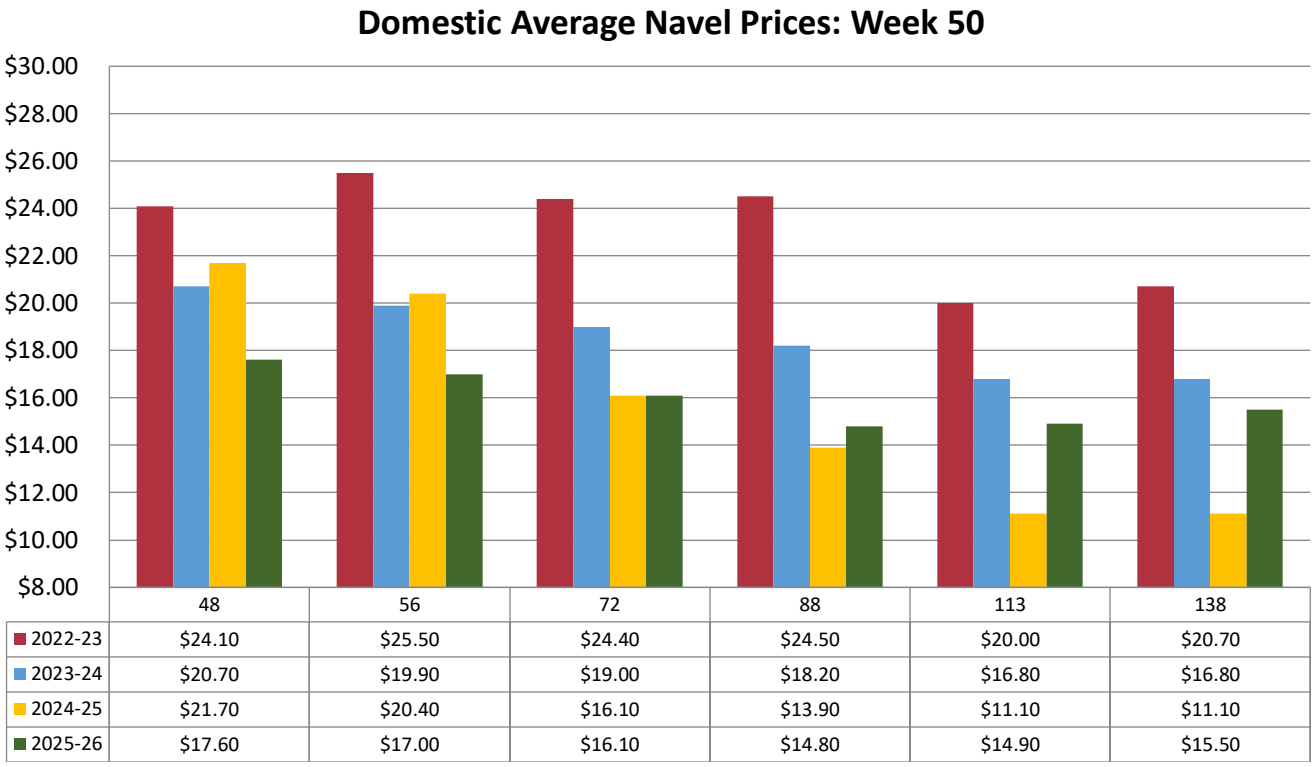
Disclaimer: *The navel prices listed below are reported to CCM from various industry representatives each week. The lemon and grapefruit prices are pulled from USDA and reflect the spot market price. Both data sets represent a range of prices that are then calculated into an average. Growers should consult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

This Week's Market Memo is Sponsored By:

PLEASE NOTE: There will be no Market Memo for the next two weeks (Thursday, December 25, 2025, and Thursday, January 1, 2026) due to the Christmas and New Year's holidays. The CCM office will also be closed these days. We wish you all a Merry Christmas and a happy New Year!

Navels – Navels are around 20% harvested. Below are the Week 50 pricing averages. Pricing for smaller fruit is likely trending upward, in part due to increasingly limited supply. Peak sizes were 88s, 72s, and 56s. There are some concerns about rot, delayed color development, and larger-than-usual sizing for this time of year. Fruit quality has been strong. Utilization is around 80%.

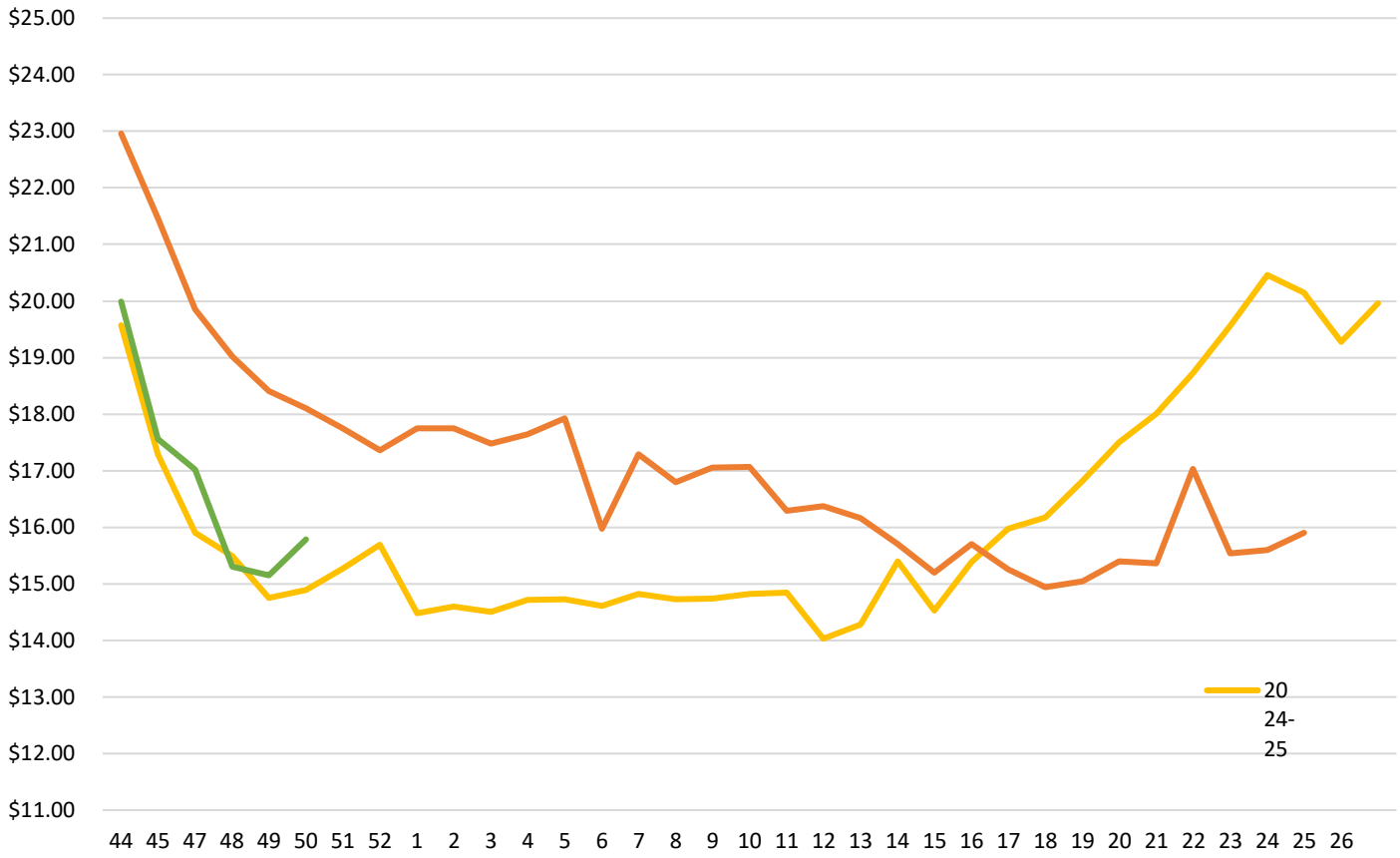
Navel Average Prices by Week							
Week #:	50		49		***Change in Price***		*Peak Sizes*
Week Ending:	12/13/2025		12/6/2025				
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***	
48	18.90	12.40	19.80	11.70	**-5%**	**6%**	7%
56	18.00	12.30	18.50	12.30	**-3%**	**0%**	19%
72	16.40	13.80	16.30	13.40	**1%**	**3%**	25%
88	14.70	13.80	14.70	13.40	**0%**	**3%**	28%
113	14.70	14.30	13.70	13.60	**7%**	**5%**	11%
138	15.30	14.60	13.90	14.10	**10%**	**4%**	4%



	48	56	72	88	113	138
2022-23	$24.10	$25.50	$24.40	$24.50	$20.00	$20.70
2023-24	$20.70	$19.90	$19.00	$18.20	$16.80	$16.80
2024-25	$21.70	$20.40	$16.10	$13.90	$11.10	$11.10
2025-26	$17.60	$17.00	$16.10	$14.80	$14.90	$15.50

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
50	$ 18.10	$ 14.89	$15.78

NAVELS
Average Weekly Price - All Sizes and Grades

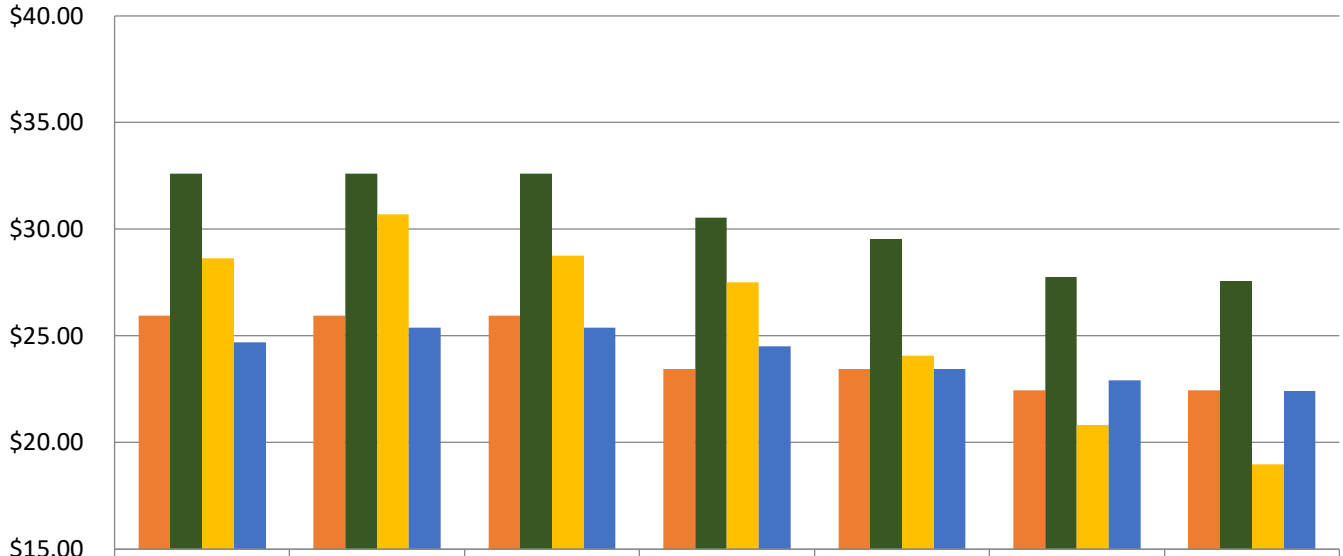


Lemons – Lemons are around 20% harvested in D1 and 80% harvested in D3. D2 lemon harvesting is beginning to pick back up, though it is still very early. Below are the pricing averages for week 50. Fruit appearance, color, internal quality, and sizing have been good, with peak sizing around 115s, 140s, and 165s.

**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 #:	50		49		***Change in Price***	
Week Ending:	12/13/2025		12/6/2025			
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***
75	27.73	21.65	27.73	21.65	**0%**	**0%**
95	27.30	23.50	27.73	22.63	**-2%**	**4%**
115	27.30	23.50	27.23	22.63	**0%**	**4%**
140	25.45	23.55	25.45	22.43	**0%**	**5%**
165	25.45	21.43	25.45	21.43	**0%**	**0%**
200	24.43	21.43	24.43	21.43	**0%**	**0%**
235	23.43	21.43	23.00	21.00	**2%**	**2%**

Domestic Average Lemon Prices: Week 50 Source: USDA AMS



	75	95	115	140	165	200	235
2022-23	$25.95	$25.95	$25.95	$23.45	$23.45	$22.45	$22.45
2023-24	$32.60	$32.60	$32.60	$30.53	$29.53	$27.75	$27.56
2024-25	$28.65	$30.70	$28.78	$27.53	$24.08	$20.83	$18.98
2025-26	$24.69	$25.40	$25.40	$24.50	$23.44	$22.93	$22.43

Orange Juice

- Futures price as of December 12, 2025, is up from last week at 163 or $1.63 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

Update on Potential USDA Assistance for Specialty Crops

The Administration has announced up to $12 billion in one-time agricultural assistance intended to help U.S. farmers address ongoing trade disruptions and rising production costs. While most of these funds are expected to be directed toward traditional row-crop commodities, USDA has indicated that a portion of the funding may be made available for commodities not covered under that framework, including specialty crops such as citrus.

To date, USDA has not released specific details regarding any potential specialty-crop assistance. Program design, eligibility criteria, application requirements, and timelines have not yet been announced, and no deadlines related to specialty-crop participation have been established.

Separately, there is strong recognition within Congress that additional resources are needed to support specialty crop producers beyond what USDA currently has available through the Commodity Credit Corporation (CCC). Discussions continue regarding the potential for additional congressional support to supplement USDA authorities and funding capacity.

California Citrus Mutual is actively engaged with federal partners and working closely with the broader specialty crop community to ensure citrus remains well positioned as these discussions progress. CCM will continue to advocate for the

maximum level of assistance achievable, including pursuing opportunities that may arise through congressional action, and will provide updates as soon as more information becomes available.

New DWR Study Reinforces Water Blueprint Concerns

The California Department of Water Resources (DWR) recently released a study that reinforces concerns long raised by the Water Blueprint for the San Joaquin Valley: without stabilizing groundwater levels and repairing critical water infrastructure, the Valley's water system, and the farms and communities that depend on it, face increasing risk.

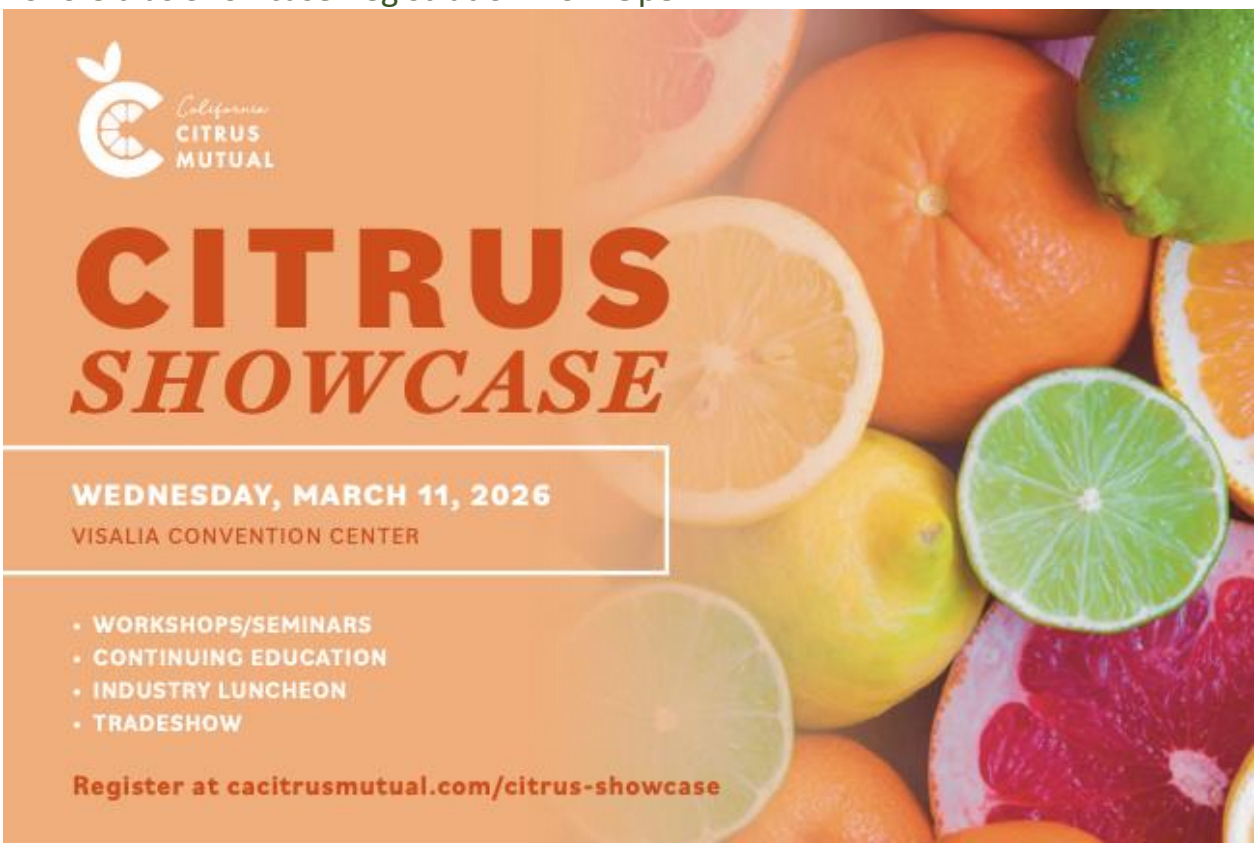
The study documents severe land subsidence that has reduced the capacity of major canals, including the San Luis Canal, the California Aqueduct, the Delta-Mendota Canal, and the Friant-Kern Canal. In some areas, canals have sunk more than eight feet, cutting conveyance capacity by up to 44 percent and reducing water deliveries by hundreds of thousands of acre-feet. These impacts limit the state's ability to move water in wet years and worsen shortages in dry periods.

The report also emphasizes that water availability remains the Valley's most significant constraint. In response, the Water Blueprint continues to advocate for expanded groundwater recharge, strategic canal repairs, conveyance improvements, and coordinated operations to capture high-flow storm events and rebuild depleted aquifers.

The Water Blueprint is advancing practical, science-based solutions to restore balance to the Valley's water system. CCM President Casey Creamer serves on the Water Blueprint board, ensuring California citrus growers' voices are represented as efforts continue to secure a reliable water future for Valley farms, communities, and businesses.

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

IN THE NEWS

The Packer: **Citrus Greening Named One of Farm Journal Foundation's "Mean 16" Biosecurity Threats**
Fresh Plaza: **Strong Supply and Demand on California Lemons**
Supermarket Perimeter: **Winter Citrus Promotable Volumes, Great Quality**
The Packer: **Specialty Crops in Crisis – Will They Receive the Farm Aid They Need?**

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