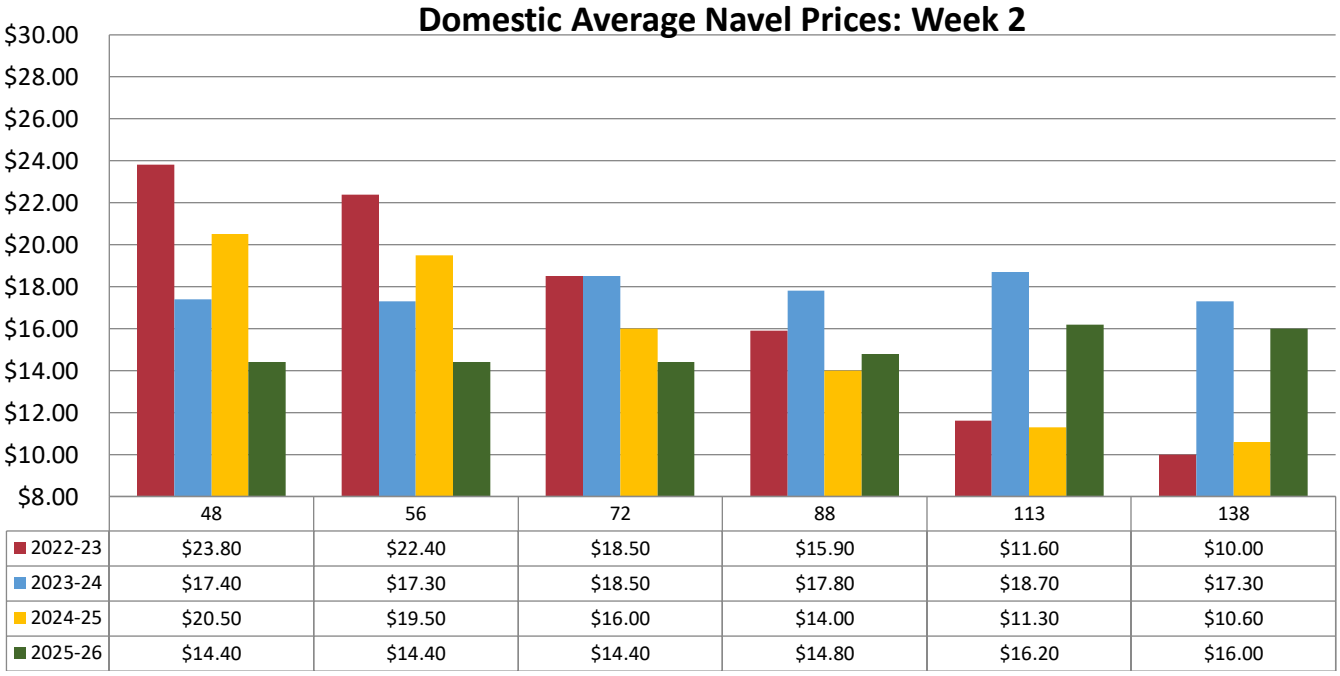
Volume 49, NO. 03 Market Memo January 15, 2026

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.*

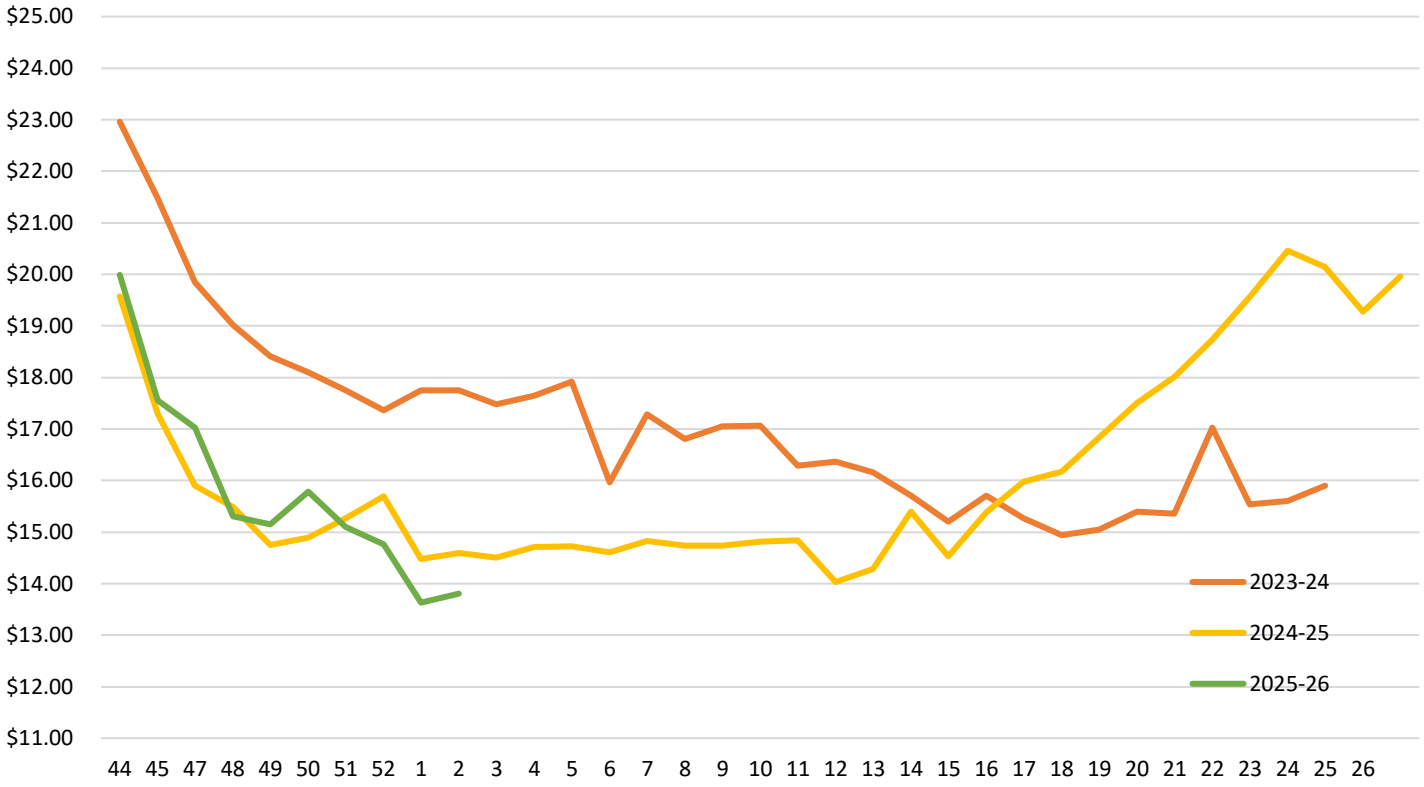
Navels – Navels are around 25% harvested. We're seeing an increasingly abundant supply of larger-sized fruit and a tighter supply of smaller fruit. There have been some concerns over fruit puff and fruit dropping off the tree. Environmental conditions like warmer temperatures, early-season rains and more recent fog seem to have played a part in some of these issues. Overall, fruit quality has been strong, and fruit color has come along after some delays early on. Below are the week 2 pricing averages. Peak sizes were 56s, 72s, and 88s. Utilization stood around 80%.

Navel Average Prices by Week							
Week #:	2		1		***Change in Price***		*Peak Sizes*
Week Ending:	1/10/2026		1/3/2026				
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***	
48	15.90	9.80	16.10	10.60	**-1%**	**-8%**	15%
56	15.50	11.30	15.80	10.80	**-2%**	**5%**	23%
72	15.30	11.90	15.50	11.60	**-1%**	**3%**	22%
88	14.90	14.20	14.80	13.70	**1%**	**4%**	17%
113	16.70	14.60	16.70	14.50	**0%**	**1%**	8%
138	16.70	13.70	15.80	13.40	**6%**	**2%**	3%



	48	56	72	88	113	138
2022-23	$23.80	$22.40	$18.50	$15.90	$11.60	$10.00
2023-24	$17.40	$17.30	$18.50	$17.80	$18.70	$17.30
2024-25	$20.50	$19.50	$16.00	$14.00	$11.30	$10.60
2025-26	$14.40	$14.40	$14.40	$14.80	$16.20	$16.00

NAVELS
Average Weekly Price - All Sizes and Grades



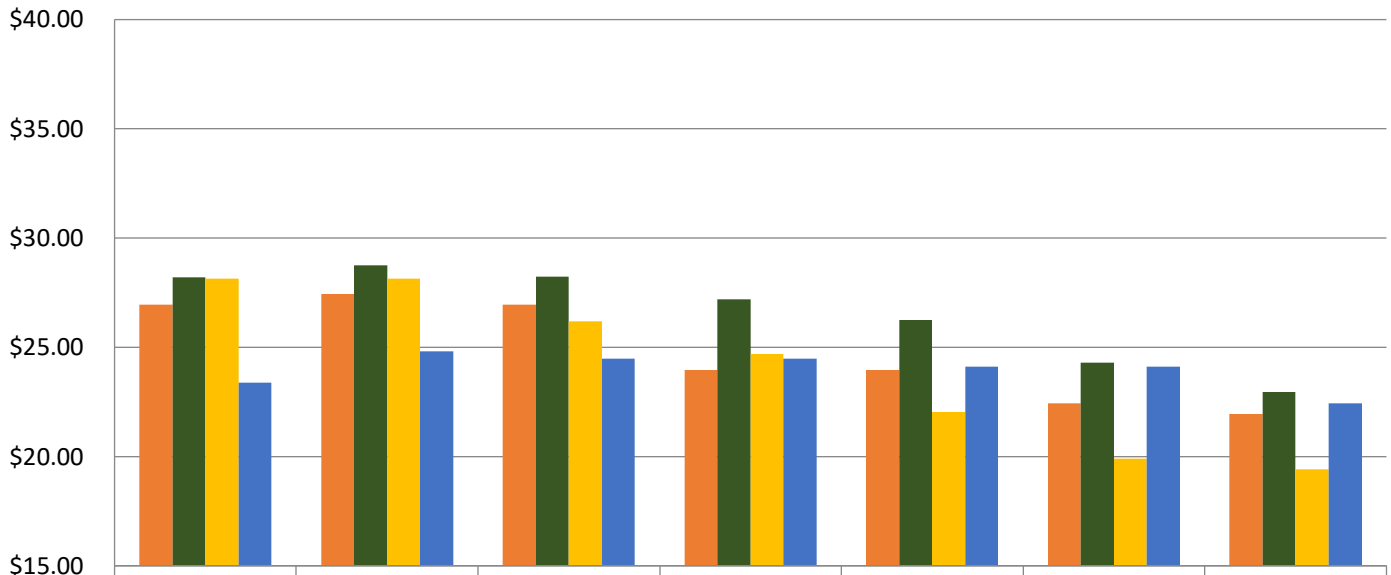
Week	2023-24	2024-25	2025-26
44	$ 22.96	$ 19.57	$19.99
45	$ 21.47	$ 17.30	$17.56
47	$ 19.85	$ 15.90	$17.02
48	$ 19.02	$ 15.49	$15.30
49	$ 18.41	$ 14.75	$15.15
50	$ 18.10	$ 14.89	$15.78
51	$ 17.75	$ 15.27	$15.10
52	$ 17.36	$ 15.69	$14.76
1	$ 17.75	$ 14.48	$13.63
2	$ 17.75	$ 14.59	$13.81

Lemons – Lemons are around 25% harvested in D1 and 90% harvested in D3, with D2 lemon harvesting continuing to pick back up. Fruit appearance, color, internal quality and sizing have been good. Below are the week 2 pricing averages. Peak sizing has been 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 #:	2		1		***Change in Price***	
Week Ending:	1/10/2026		1/3/2026			
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***
75	26.60	20.18	27.98	21.65	**-5%**	**-7%**
95	27.93	21.73	27.93	22.95	**0%**	**-5%**
115	27.48	21.50	26.45	22.43	**4%**	**-4%**
140	27.00	21.98	27.00	22.43	**0%**	**-2%**
165	24.93	23.28	24.43	22.95	**2%**	**1%**
200	24.65	23.55	24.43	23.55	**1%**	**0%**
235	23.43	21.43	23.43	N/A	**0%**	**N/A**

Domestic Average Lemon Prices: Week 2 Source: USDA AMS



	75	95	115	140	165	200	235
2022-23	$26.95	$27.45	$26.95	$23.95	$23.95	$22.45	$21.95
2023-24	$28.20	$28.74	$28.24	$27.20	$26.24	$24.31	$22.96
2024-25	$28.15	$28.14	$26.18	$24.70	$22.04	$19.90	$19.43
2025-26	$23.39	$24.83	$24.49	$24.49	$24.10	$24.10	$22.43

Orange Juice

- Futures price as of January 9, 2026, is up from last week at 204 or $2.04 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

CDFA Announces Vacancies on the Citrus Pest and Disease Prevention Committee

The California Department of Food and Agriculture is announcing one vacancy on the Citrus Pest and Disease Prevention Committee. The Committee advises the CDFA Secretary on activities associated with the statewide citrus-specific pest and disease work plan. This includes outreach and education programs and programs for surveying, detecting, analyzing, and treating pests and diseases specific to citrus.

A vacancy exists for a public member on the committee. The term will expire in 2030. Applicants should be interested in agriculture and in citrus pest and disease prevention. Individuals interested in being considered for a committee appointment should send a brief résumé by January 31, 2026, to the California Department of Food and Agriculture, Citrus Pest and Disease Prevention Division, 1220 N Street, Sacramento, CA 95814, Attention: Keith Okasaki.

For additional information, contact Keith Okasaki, Manager, Citrus Pest and Disease Prevention Division at (916) 274-6300, or e-mail Keith.Okasaki@cdfa.ca.gov.

2025 Chile Lemon Exports See Strong Growth in Europe While U.S. Shipments Decline Slightly

Chile closed the 2025 lemon season with exports totaling 126,865 metric tons (MT), a 23 percent increase from 2024, marking a clear rebound in volume and renewed momentum in non-traditional markets, according to a recent Frutas de Chile report.

Shipments were handled almost entirely by sea, which accounted for 91 percent of exports, while land transport represented 9 percent, and air freight was negligible, underscoring a logistics strategy centered on scale and continuity. Export supply remained concentrated in central regions, led by the Metropolitan Region, with a 39 percent share and moderate growth, followed by Coquimbo and Valparaíso, which posted stronger year-over-year increases and together accounted for more than half of total volume.

North America remained Chile's largest destination, receiving 46 percent of exports, although volumes declined slightly compared with the prior season, suggesting some softening in demand. Shipments to the Far East increased modestly and represented more than a quarter of total exports, while Latin America also recorded solid growth from a smaller base. Europe stood out as the most significant shift in the market, with exports rising sharply to 21,600 thousand MT and accounting for 17 percent of total shipments, reflecting a major expansion in market presence during the season.

Changes in product mix and import channels were evident, with strong growth in Eureka and Fino 49 varieties and large gains in markets such as the Netherlands and Argentina, offset by declines in the United States, Japan, and South Korea, pointing to a broader rebalancing of demand and entry points.

Weather Watch Program

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.

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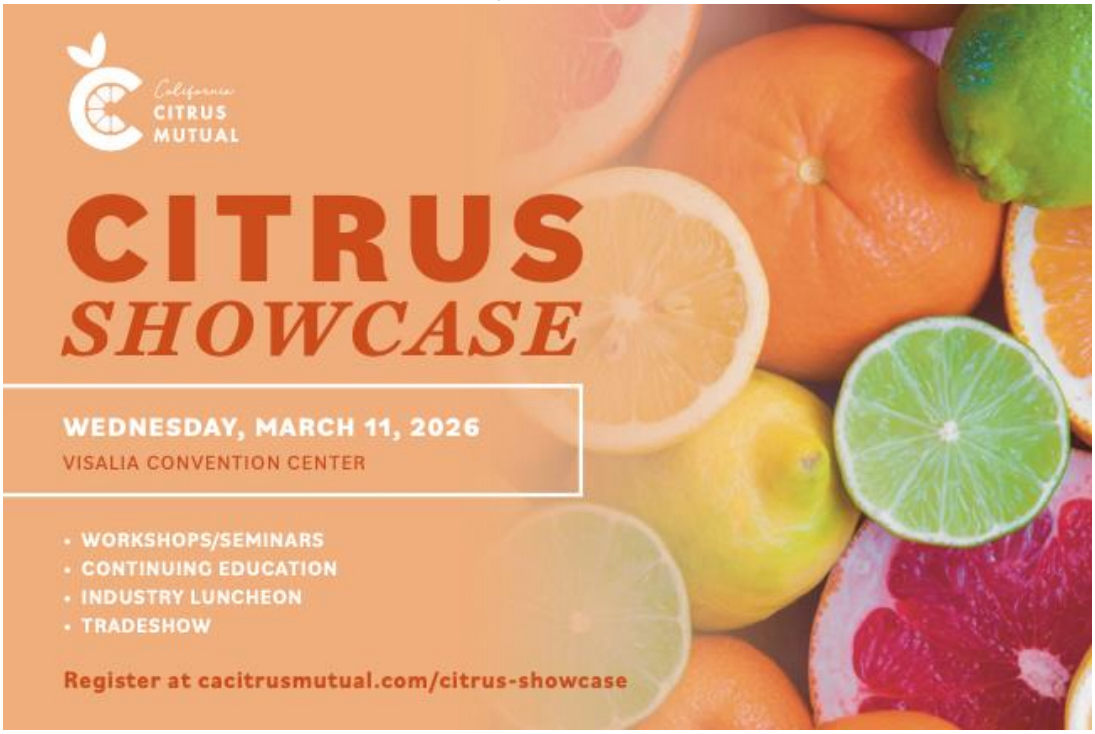
UPCOMING EVENTS

2026 Citrus Showcase: March 11, 2026



Citrus Showcase is set for March 11, 2026, at the Visalia Convention Center. **Exhibit Booths and Industry Luncheon tickets are selling fast! We highly recommend securing your spot ASAP!** Sponsor opportunities are also limited. Please note that sponsor registration will close February 13, 2026, to account for print times.

For general inquiries or questions about sponsorships and/or exhibitor information, please contact Jessica Gravitt at (559)592-3790 or jessica@cacitrusmutual.com. We will share more details about the event schedule in the coming weeks.

Register here

IN THE NEWS

ABC30 Action News: Fresno Braces for Overnight Frost as Citrus Growers Monitor Temperatures
Fresh Plaza: Global Market Overview Oranges
Growing Produce: Quarantine Area for Citrus Greening on the Grow in California

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