California CITRUS MUTUAL

Volume 49, NO. 21 **Market Memo** **May 21, 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.*

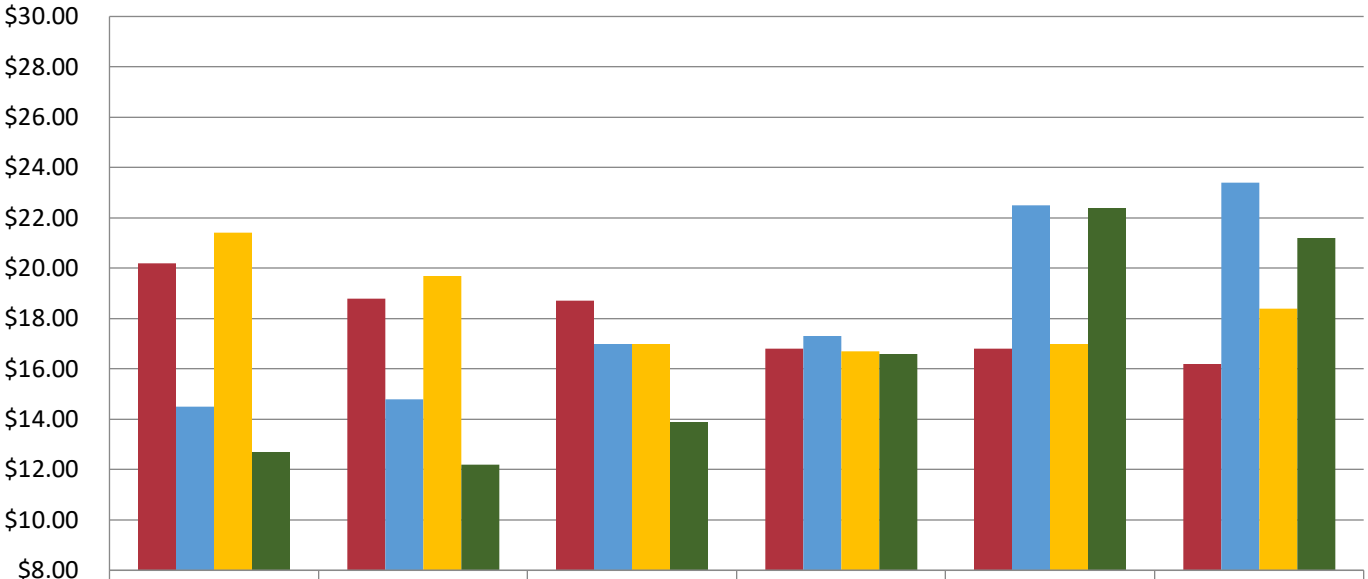
This Week's Market Memo is Sponsored By:

Navels – Navels are around 90% harvested. Movement remains strong, and import pressure is limited for the time being. Some re-greening has been noted, and the continued abundance of large sizes has led to marketing challenges all season. That said, pricing remains relatively steady as domestic supply dwindles.

Below are the week 20 pricing averages. Peak sizes were 56s and 72s and followed by 48s and 88s. Utilization was around 70-80%.

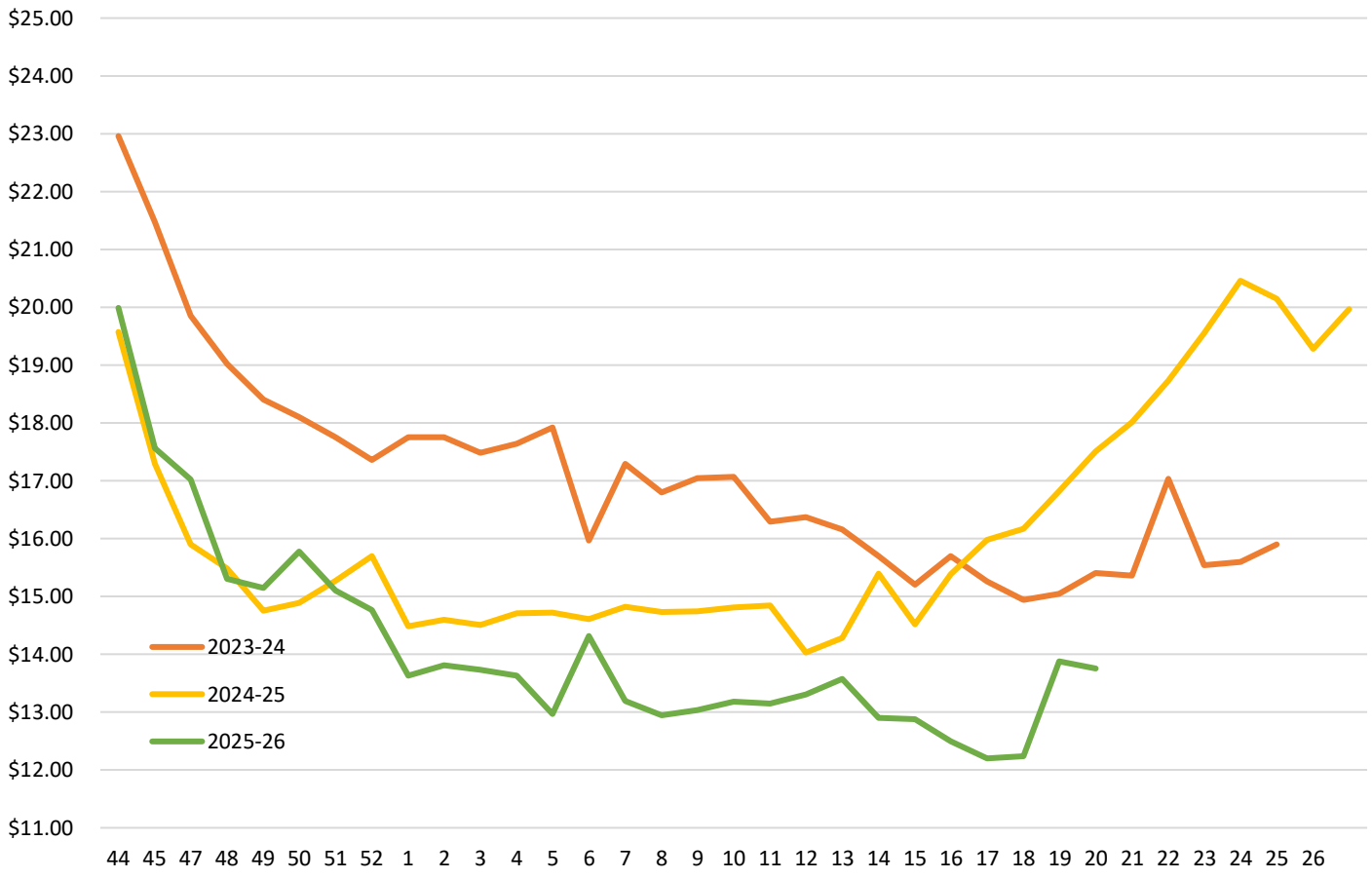
Navel Average Prices by Week							
Week #:	20		19		***Change in Price***		*Peak Sizes*
Week Ending:	5/16/2026		5/9/2026				
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***	
48	14.60	9.00	14.20	8.60	**3%**	**5%**	16%
56	14.10	8.50	14.00	8.40	**1%**	**1%**	27%
72	15.90	10.20	15.30	10.40	**4%**	**-2%**	26%
88	16.90	15.20	17.10	15.10	**-1%**	**1%**	15%
113	23.40	19.80	24.10	20.20	**-3%**	**-2%**	5%
138	22.80	17.60	21.30	20.00	**7%**	**-12%**	1%

Domestic Average Navel Prices: Week 20



	48	56	72	88	113	138
2022-23	$20.20	$18.80	$18.70	$16.80	$16.80	$16.20
2023-24	$14.50	$14.80	$17.00	$17.30	$22.50	$23.40
2024-25	$21.40	$19.70	$17.00	$16.70	$17.00	$18.40
2025-26	$12.70	$12.20	$13.90	$16.60	$22.40	$21.20

NAVELS
Average Weekly Price - All Sizes and Grades



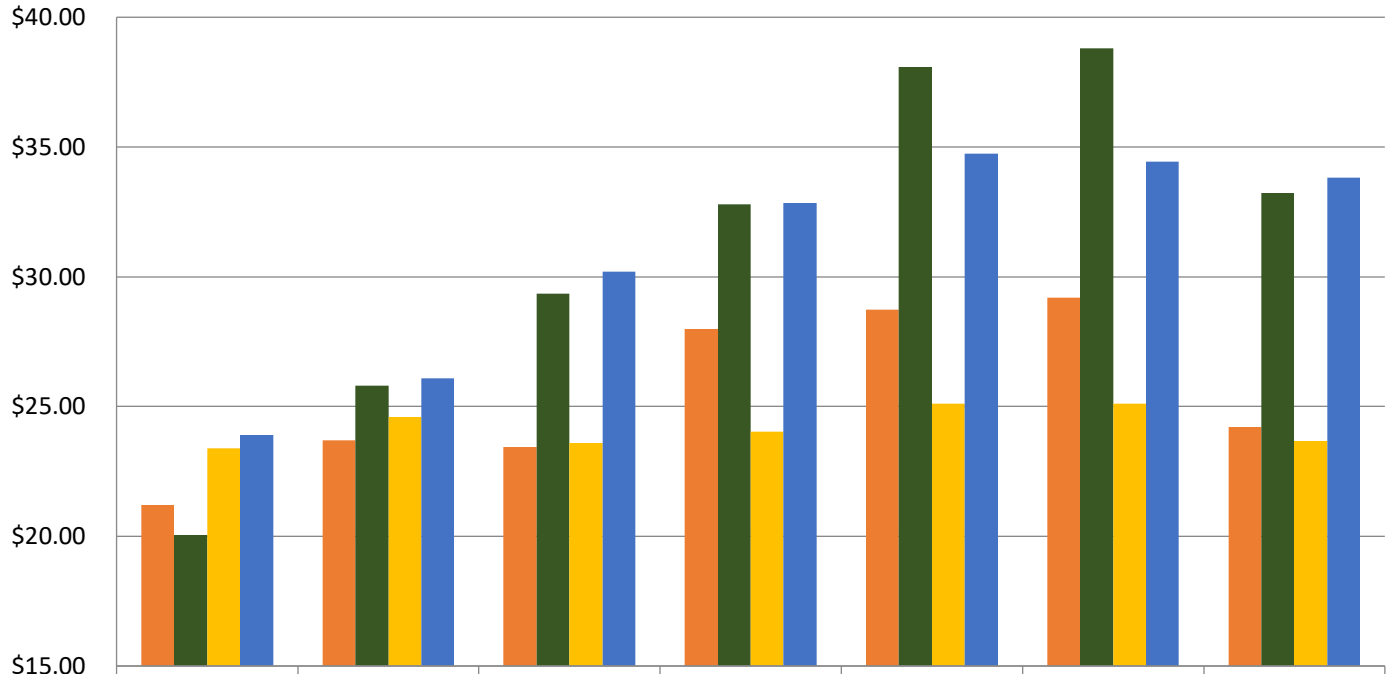
Week	2023-24	2024-25	2025-26	Week	2023-24	2024-25	2025-26
44	$ 22.96	$ 19.57	$ 19.99	10	$ 17.07	$ 14.82	$ 13.18
45	$ 21.47	$ 17.30	$ 17.56	11	$ 16.29	$ 14.85	$ 13.15
47	$ 19.85	$ 15.90	$ 17.02	12	$ 16.37	$ 14.03	$ 13.31
48	$ 19.02	$ 15.49	$ 15.30	13	$ 16.16	$ 14.28	$ 13.58
49	$ 18.41	$ 14.75	$ 15.15	14	$ 15.70	$ 15.40	$ 12.90
50	$ 18.10	$ 14.89	$ 15.78	15	$ 15.20	$ 14.52	$ 12.88
51	$ 17.75	$ 15.27	$ 15.10	16	$ 15.70	$ 15.40	$ 12.50
52	$ 17.36	$ 15.69	$ 14.76	17	$ 15.26	$ 15.97	$ 12.20
1	$ 17.75	$ 14.48	$ 13.63	18	$ 14.94	$ 16.17	$ 12.24
2	$ 17.75	$ 14.59	$ 13.81	19	$ 15.05	$ 16.82	$ 13.88
3	$ 17.48	$ 14.50	$ 13.73	20	$ 15.40	$ 17.50	$ 13.75
4	$ 17.64	$ 14.71	$ 13.63				
5	$ 17.92	$ 14.72	$ 12.97				
6	$ 15.97	$ 14.61	$ 14.32				
7	$ 17.29	$ 14.82	$ 13.19				
8	$ 16.80	$ 14.73	$ 12.95				
9	$ 17.05	$ 14.74	$ 13.03				

Lemons - D1 lemons are just under 100% harvested as we transition into the bulk of the D2 lemon season. Peak sizes in D1 are finishing around 115s, 95s, 140s, and 75s with utilization around 80%. D2 lemons are around 40% harvested and are peaking around 115s, 95s, 140s and 165s. A warm March led to some fruit drop, which is typical. It has been noted that the color is turning well, despite some early challenges with green fruit. Import pressure is limited for the time being.

Below are the week 20 pricing averages.

Lemon Average Prices by Week						
Week #:	20		19		***Change in Price***	
Week Ending:	5/16/2026		5/9/2026			
Size	Fancy	Choice	Fancy	Choice	***Fancy***	***Choice***
75	27.13	20.68	25.85	20.68	**5%**	**0%**
95	29.95	22.23	27.73	21.95	**8%**	**1%**
115	34.18	26.23	32.05	25.63	**7%**	**2%**
140	34.05	31.65	34.05	30.95	**0%**	**2%**
165	34.93	34.55	34.93	34.05	**0%**	**1%**
200	34.93	33.93	34.93	33.03	**0%**	**3%**
235	34.03	33.60	34.03	33.30	**0%**	**1%**

Domestic Average Lemon Prices: Week 20 Source: USDA AMS



	75	95	115	140	165	200	235
2022-23	$21.20	$23.70	$23.45	$27.99	$28.74	$29.20	$24.21
2023-24	$20.06	$25.81	$29.35	$32.79	$38.08	$38.81	$33.24
2024-25	$23.40	$24.59	$23.59	$24.03	$25.10	$25.10	$23.68
2025-26	$23.90	$26.09	$30.20	$32.85	$34.74	$34.43	$33.81

Orange Juice

- Futures price as of May 15, 2026, was down the week prior at 164 or $1.64 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 1 year ago, on May 22, 2025, was 272 or $2.72 per pound solid.

California Citrus Mutual 2025 Impact Report

California Citrus Mutual's (CCM) 2025 Impact Report highlights the organization's continued efforts to protect and strengthen the California citrus industry through advocacy, funding, and grower support programs. In 2025, CCM helped secure funding and support for citrus growers, including USDA citrus purchases, HLB research funding, MASC payments, and investments in citrus breeding and pest prevention programs. The report highlights key advocacy wins that protected growers' profitability and preserved critical tools and markets for the industry.

The report further details CCM's work representing growers in trade discussions, combating harmful legislation, and protecting fresh citrus from restrictive food classification proposals. In addition to policy and funding work, CCM continues to provide member services and grower education opportunities.

CCM 2025 Impact Report

Updates to H-2A English Language Proficiency Requirements and Wage Rule

Two important H-2A developments occurred last week that could affect agricultural employers. The first involves new English-language proficiency requirements for certain H-2A positions. The second is a positive legal decision that upholds the current H-2A wage rule.

New Clarification for English-Language Proficiency Requirements – Action Possibly Needed

On May 14, the Department of Labor (DOL) released new Frequently Asked Questions clarifying that employers must include English-language proficiency requirements in job orders and applications for temporary or permanent labor certification when applicable. The guidance applies to any position involving the operation of a commercial motor vehicle, regardless of whether a CDL or agricultural exemption applies.

Key Takeaways for Employers:

Employers should work with their attorneys, agents, labor contractors, or application preparers right away to update upcoming H-2A job orders if English-language proficiency is required for the position. Failing to include the proper language could delay the application process.

The Department of Labor (DOL) provided the following example language for job orders and applications:

> "The worker must be able to read and speak the English language sufficiently to converse with the general public, understand highway traffic signs and signals in English, respond to official inquiries, and make entries on reports and records."

Applications that lack the required English-language proficiency may receive a Notice of Deficiency, which will pause processing until the deficiency is corrected. These new requirements will take effect 30 days after publication.

Federal Court Upholds H-2A Wage Rule – Win for Agriculture

On May 14, a federal court in California denied a request to block the Department of Labor's Adverse Effect Wage Rate (AEWR) Methodology Interim Final Rule.

The court ruled that the plaintiffs did not show enough evidence of immediate harm to justify stopping the rule while the case continues. While the lawsuit is still moving forward, the decision is considered a major win for agriculture because it provides near-term stability and certainty for employers.

Key Takeaways for Employers:

There will be no immediate changes to H-2A wage determinations as a result of this ruling. The next AEWR update is expected in July 2026.

Citrus Export Season Underway for Chile and South Africa

Chile's Port of Coquimbo Launches 2026 Citrus Export Season

According to media reporting from Frutas de Chile, the 2026 citrus export season officially began at the Port of Coquimbo. This marks the third consecutive year of regular container service supporting Chilean citrus exports from the region. Terminal Puerto Coquimbo noted that the service is expected to operate weekly through the end of June, supporting regional exporters with direct refrigerated shipping capacity during the peak citrus export window.

The launch comes amid expectations for a strong Chilean citrus season. According to the Chilean Citrus Fruit Committee, Chile exported approximately 444,000 MT of citrus fruit in 2025, up 11% from the previous season. Mandarins are expected to lead projected growth this season, followed by clementines and lemons. The United States remains the primary market for Chilean clementines and mandarins, while Japan continues to be a key destination for lemons.

Industry and government officials highlighted the importance of coordinated public-private collaboration to support exports and maintain phytosanitary standards. Regional authorities noted that efforts to address fruit fly concerns are being strengthened through cooperation among exporters, the Agricultural and Livestock Service (SAG), logistics operators, and port authorities.

South Africa Becomes World's Largest Citrus Exporter as Flooding Threatens 2026 Crop

The Citrus Growers' Association of Southern Africa (CGA) recently announced that South Africa narrowly overtook Spain in 2025 to become the world's largest citrus exporter by volume, shipping a record 204 million 15kg cartons (approximately 2.9 million MT). The CGA additionally released its 2026 Industry Statistics Report, providing a detailed overview of the sector's production, export, logistics, and market performance during the 2025 season.

CGA attributed the milestone to sustained investment in orchards and production technology, improved logistics performance, and collaboration between growers, government, and the broader supply chain. They also noted the achievement supports the industry's long-term target of increasing exports to 260 million 15kg cartons by 2032, while expanding market access in destinations including the EU, U.S., India, and China.

At the same time, severe flooding and high winds across South Africa's Western and Eastern Cape regions have created significant challenges for the current citrus season. Early assessments indicate that certain local crops may be reduced by 10-12%. Industry groups are still assessing the full extent of the damage, while washed-out roads, power outages, and logistics disruptions are complicating the movement of fruit to ports during the peak export period.

UPCOMING EVENTS

Registration Open for Kick-Off Classic Golf Tournament – SPACE FILLING UP FAST!

Please be aware that team spots and sponsorship opportunities are filling up fast, so we strongly encourage those interested in participating to register ASAP.

Registration is now open for our annual Kick-Off Classic Golf Tournament on September 18, 2026. This year, we will be returning to the newly renovated River Island Country Club in Porterville. Don't wait to sign up your team, as this event sells out each year. We also have a limited number of sponsorships available to promote your company while supporting the California citrus industry. To review sponsorship opportunities, click here.

All proceeds from this tournament support CCM's Political Action Committee (PAC), which provides vital funding throughout the year for important advocacy in Sacramento and Washington, D.C. to advance the interests of citrus growers.

Event Details:

- Friday, September 18, 2026
- 8 AM registration and breakfast, 9 AM shotgun start
- River Island Country Club, Porterville
- Register as a sponsor, a team of 4, or an individual

REGISER HERE

If you have questions, please contact Jessica Gravitt at jessica@cacitrusmutual.com or (559)936-9100.

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