

# PRO\*ACT

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## Crop Update

*August 27, 2025*

### Small Fruit Tightens in California Citrus

California's citrus season is in full swing, and while quality remains fair across the board, the story this month is all about sizing. Both Valencia oranges and lemons are showing a strong shift toward larger fruit, with small sizes becoming harder to come by as we move through the peak of summer.

Valencia oranges continue to ship out of the Central Valley, Fillmore, and Riverside regions. Growers are reporting excellent eating quality. The crop is peaking on 88-count fruit, with noticeably fewer 113s and 138s available, intensified by added pressure as school programs ramp up and the push for smaller fruit. We're also seeing some regreening caused by warm weather. It's common during the Valencia season and reflects the fruit's response to late-summer heat with no impact on sweetness or quality. While sizing is shifting larger, current projections do not suggest a gap before the fall Navel season, expected to begin late October. We'll see a full crop assessment on navels in the next few weeks.



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Lemons are following suit with oranges and are trending on the larger side. District 2 (Ventura County) is now the primary growing region, and the crop is dominated by 115s and 140s in mostly choice grade. Higher humidity and wind, contributing to scarring and softer fruit in some lots. This is fairly common this time of year with fruit grown along the coast. Globally, the lemon market remains tight, with small fruit being especially limited. Argentina's season is wrapping up earlier than usual, and Chilean arrivals are already starting to slow. District 3 (desert region) is expected to begin production in early October and may help relieve some of the size pressure.

California grapefruit is also transitioning, with growers beginning to harvest pink varieties this week. Choice-grade fruit is widely available, while fancy-grade lots are moving quickly.

Despite the global squeeze on small fruit, overall quality and flavor remain strong heading into the late summer pull. As always, staying close to crop updates and keeping programs flexible will help navigate the shifting size structure as we approach fall.

