

Crop Update

January 7, 2026

The Small Citrus Squeeze

Small citrus is going to be a challenge for the rest of this season, and it's not likely to correct itself any time soon. The California Navel crop continues to skew heavily toward larger sizes, with production peaking on 56- and 72-count fruit. Small sizes, particularly 88-, 113-, and 138-count, remain extremely limited and are expected to stay tight through the balance of the Navel season and into the transition to Valencias.

The weather in California's Central Valley has been the main driver behind this size profile. Earlier in the season, citrus trees experienced a prolonged growth pause after nearly a month of limited sunlight, misty mornings, and cool daytime temperatures. That combination put trees under stress, leading to noticeable fruit drop across multiple varieties. In some groves, growers estimate losses of 30 to 40 percent before harvest volumes had a chance to build.

That stress was followed by record rainfall and then a quick shift back to sunny, warmer conditions. Those swings are now showing up in the form of quality challenges that are difficult to detect at harvest. Issues like clear rot, puffing, and creasing are becoming more common, which means additional fruit is being sorted out during packing. Even where groves appear full, pack outs are much lighter than expected, and small fruit simply is not there.



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Small Navel oranges are the tightest and will remain the most difficult to source.

Lemons are also seeing pressure, especially on larger sizes, as earlier weather slowed growth. Mandarins have been particularly affected by fruit drop, further tightening availability in that segment.

Navel oranges are consistently testing in the 12 to 13 Brix range, and the eating quality has been excellent. This is not a flavor issue as much as it's a sizing issue. To maintain coverage, flexibility will be critical. Larger-size Navel oranges will continue to be more available, and Cara Cara oranges can help bridge gaps when available. Mandarins may also be an option depending on timing and programs.

Florida fruit will continue to play a supporting role in the market, particularly as sizing profiles differ from those in California. Mexico and Texas will also provide additional options, but none fully replace the availability of California small Navel oranges.

Planning remains important. Orders placed with additional lead time will have the best chance of being filled as requested. As suppliers manage tight size distributions, substitutions will become more common.

Looking ahead, the current size profile is expected to persist through the Navel season and into Valencias. Small fruit will remain the most constrained part of the citrus front, and flexibility on size and variety will be key to navigating the months ahead.

