

PRO*ACT

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Crop Update

September 23, 2026

A Fresh Look at Navels

Fall is officially here. While iceberg, broccoli and cauliflower are still sitting high on our watch list, it's a good time to turn our attention to another seasonal change happening in produce.

We're getting close to the end of California's Valencia orange season, and for the first time we have a pretty good look at what the upcoming Navel crop may have in store.

The first USDA estimate puts the 2026-27 California Navel crop at 84 million cartons, up slightly from the 82 million cartons produced last season. Fruit set is also up about 3%, while average fruit size is almost identical to last year.

On paper, that's a pretty encouraging start.

For most of the summer, the story on Valencias has been size. Small fruit, especially 113s and 138s, has been difficult to come by, and school demand quickly exposed just how limited that part of the crop was. The hope with Navels is that a slightly larger crop gives us a little more breathing room and better availability across the size profile.



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We're expecting the first California Navels to begin shipping around mid to late October. That timing should line up pretty well with the end of the Valencia season and, assuming the crop develops as expected, give us a smoother transition into fall and winter citrus.

The 84-million-carton forecast is larger than last year, but it's not an unusually large crop. Looking back at the historical numbers, California has produced crops north of 90 million cartons in several previous seasons, so this looks more like a healthy crop than an oversupplied one.

That should be good news for both sides of the market. More fruit should help improve availability and give foodservice, fresh-cut and grab-and-go programs a little more consistency, while overall production still looks reasonable enough to keep the market from becoming overly heavy.

There's still plenty of fruit left to grow between now and the first meaningful Navel harvest, and the early pack-outs will tell us a lot more about where the sizes actually land. But after a Valencia season where small fruit has been one of the biggest challenges, a slightly bigger Navel crop is a welcome way to start fall.

