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Fruit and Tree Nuts Outlook: September 2026

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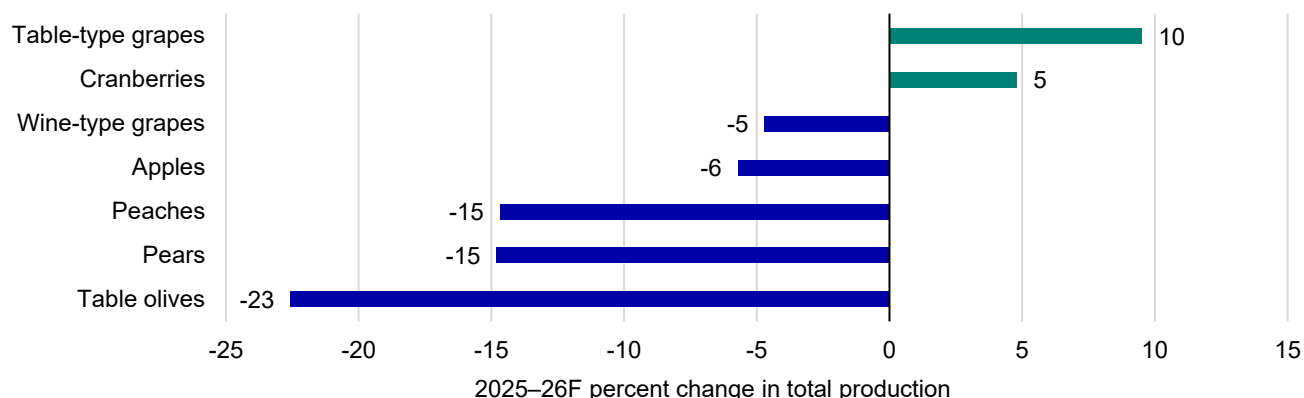
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Fruit Production Forecasts in 2026

USDA's National Agricultural Statistics Service (NASS) forecasts increased production of table-type grapes and cranberries in 2026. In contrast, output for wine-type grapes, apples, peaches, pears, and table olives is expected to decline. California's table grape crop is projected to rise by 10 percent compared to last year, while U.S. cranberry production is estimated to increase by 5 percent from 2025. Wine-type grape production in California and Washington is anticipated to decrease by 5 percent year over year. U.S. apple production is forecast to fall by 6 percent from last season, marking the smallest crop since 2022. Peach production is also expected to be lower, with year-over-year declines in six of the seven surveyed States. Pear production is expected to contract by 15 percent, with reductions in California, Oregon, and Washington. Table olive production in California is forecast to drop by 23 percent compared to 2025.

Year-to-year change in production for selected fruits, 2025–26F



F = Forecast.

Note: Table-type grape forecast represents California table-type grape production. Wine-type grape forecast includes wine-type production in California and Washington.

Source: USDA, Economic Research Service based on data from the USDA, National Agricultural Statistics Service,

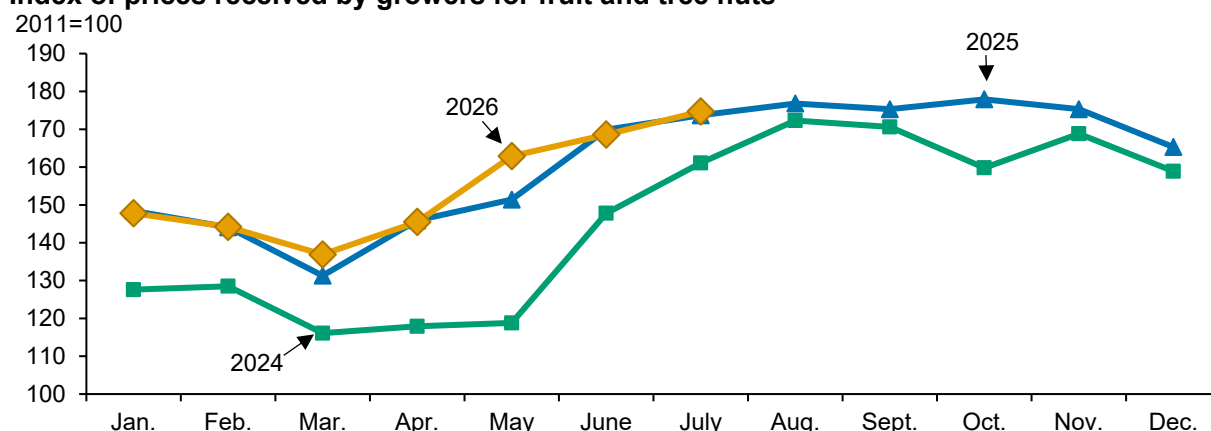
Price Outlook

Fresh Fruit Consumer Prices Are Higher in 2026

In July 2026, the index of prices received by growers for fruit and tree nuts reported by USDA, NASS was 175 (2011=100), marking a 0.5-percent increase from July 2025 and an 8-percent rise compared to July 2024 (figure 1). The index exhibited sequential monthly growth from April through July. If this year's monthly pattern is consistent with historical trends, the index is expected to peak between August and October. This seasonal trend reflects shifts in the mix of commodities marketed each month. During summer and fall, the index typically rises as domestic producers market greater volumes of high-value, fresh-market fruits and tree nuts.

Figure 1

Index of prices received by growers for fruit and tree nuts



Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Consumer Price Index for fresh fruit in 2026: The Consumer Price Index (CPI) for fresh fruit was reported at 425.2 (1982–84=100) in August 2026, up 4 percent from the same time last year according to data from the U.S. Department of Labor, Bureau of Labor Statistics. As of August 2026, the Fresh Fruit CPI accounted for 0.531 percent of the total CPI-U basket (all consumer items combined). The August 2026 Fresh Fruit CPI consisted of 4 individually weighted components: Apple CPI (15 percent), Banana CPI (11 percent), Citrus Fruit CPI (15 percent), and the Other Fresh Fruit CPI (59 percent). The Other Fresh Fruit CPI is the most heavily weighted component in the Fresh Fruit CPI. This CPI represents a catch-all category that excludes apples, bananas, and citrus fruits, but includes a variety of popular fresh fruit commodities like strawberries, blueberries, avocados, melons, and grapes. In August 2026, three of four components of the Fresh Fruit CPI were higher compared to the same month a year ago: Apple CPI (up 5 percent), Other Fresh Fruit CPI (up 5 percent), and Citrus Fruit CPI (up 2 percent). Banana CPI was higher in both June and July 2026 compared to the same months in 2025; however, in August 2026, it was 1.4 percent lower than in August 2025.

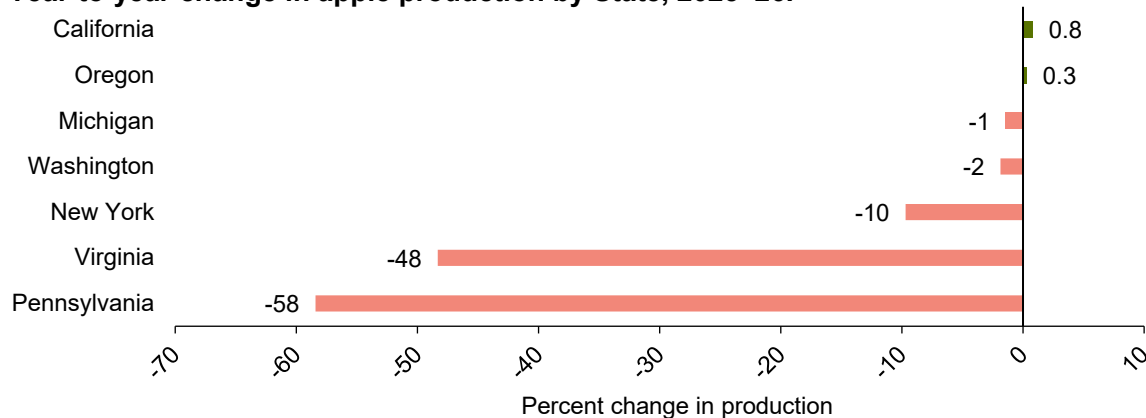
Noncitrus Fruit Outlook

U.S. Apple Production 2026 Outlook Varies by Region

The 2026 U.S. apple crop is forecast at 10.4 billion pounds according to the August USDA, NASS *Crop Production* report. The 2026 apple forecast is 665 million pounds lower than it was in 2025 following decreases in production in 5 of the 7 NASS-surveyed States (figure 2). If realized, the 2026 crop falls 6 percent below last year and 1 percent below the previous 5-year average (2020–24). The outlook for this year’s crop varies by region. Lower production in the mid-Atlantic States is largely due to a damaging spring freeze. Year-over-year decreases in production are forecast for Pennsylvania (down 58 percent), Virginia (down 48 percent), and New York (down 10 percent). In contrast, apple production for all three West Coast States and Michigan in 2026 are forecast within 2 percent of last year’s volume.

Figure 2

Year-to-year change in apple production by State, 2025–26F



F = Forecast.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (August 2026).

In **Washington State**, the largest apple producing State, the crop is forecast to be 7.4 billion pounds, 2 percent lower (140 million pounds) than last year but 6 percent higher than the previous 5-year average. Over the previous 5 seasons, Washington’s share of U.S. fresh-market apple production ranged from 71 to 80 percent. This large share means that changes in Washington’s apple production has an outsized influence on U.S. fresh apple domestic availability, average prices, and exports, relative to other apple-producing States. In marketing year (MY) 2026/27 (August–July), the top 5 apple varieties in Washington (Gala, Granny Smith, Red Delicious, Honeycrisp, and Cosmic Crisp) are expected to account for 68 percent of volume, according to the U.S. Apple Association’s (USApple) *Industry Outlook 2026* report.

The 2026 NASS apple production forecast for **Michigan** is 1.05 billion pounds, a 1-percent reduction (down 15 million pounds) from last season and 7 percent below the previous 5-year average. Michigan apple growers have faced variable weather conditions this season, including cool spring temperatures and periods of unusually high temperatures. Variable temperatures early this year contributed to an extended bloom period, which may result in inconsistent levels of fruit maturity within orchards, according to the Michigan State University Extension. Apple harvest started at the end of August this year and will continue through October. In MY 2026/27, Michigan's top 5 varieties (Gala, Honeycrisp, Red Delicious, Fuji, and Golden Delicious) are expected to account for 58 percent of forecasted volume, according to USApple, a national trade association representing the U.S. apple industry.

Fruit-damaging freeze in the mid-Atlantic: Above-normal temperatures during March and early April triggered early bud break across the Mid-Atlantic and parts of New York. A regional cold snap around April 21 damaged fruit trees and lowered expectations for this year's apple harvest, though impacts were not uniform. Orchards later in the crop development process were more susceptible to severe damage, as cold resistance declines with development. On April 19, 2026, before the freeze, 17 percent of New York apple orchards were at green tip (early post-dormancy), while Pennsylvania reported 75 percent at pink bud and 38 percent in full bloom—stages especially vulnerable to freeze damage. During August 2026, NASS reported poor to very poor State-level apple conditions in Pennsylvania (83 percent), Virginia (69 percent), New Jersey (80 percent), and New York (24 percent). Extension and industry sources report that freeze damage across the region has ranged from total crop loss to reduced pollination and fruit set, as well as cosmetic injuries that diminish quality and appearance of harvestable fruit.

In **New York**, 2026 apple production is forecast at 1.35 billion pounds, down 145 million pounds from last season's bumper crop and 1 percent below the previous 5-year average. Impacts from the late April freeze, bouts of high summer temperatures, and variable rainfall have contributed to mixed conditions within different apple-growing areas in the State, according to the Cornell Cooperative Extension. On August 30, NASS crop conditions for New York apples were rated 47 percent good to excellent (5-year average is 51 percent), 29 percent fair (5-year average is 38 percent), while 24 percent were rated very poor to poor (5-year average is 11 percent). By September 20, 40 percent of New York's apple crop was harvested, which was 3 points ahead of the 5-year average. The top 5 apple varieties by volume (Gala, Idared, Rome, McIntosh, and Empire) are forecast to account for 45 percent of New York's 2026 crop, according to USApple.

Pennsylvania is forecast to produce 210 million pounds of apples in 2026, a 295-million-pound (58 percent) reduction from 2025. At the end of August 2026, only 13 percent of Pennsylvania's

apple crop was rated good to excellent, which was well below last year (81 percent) and the 5-year average (74 percent). Harvest for this year's short crop started in early August and by September 20 was 90 percent complete, which is well ahead of the 5-year average for the same period (63 percent). In MY 2026/27, the top 5 apple varieties in Pennsylvania (York, Golden Delicious, Gala, Fuji, and Red Delicious) are expected to account for 62 percent of total volume, according to USApple.

In **Virginia**, apple production is forecast at 77 million pounds in 2026, a 72-million-pound reduction from 2025. Last season, Virginia apple growers also experienced a damaging spring freeze that contributed to a 35-percent year-over-year production decline. If realized, 2026 would fall 63 percent short the previous 5-year average of 206.6 million pounds (2020–24) and mark the smallest Virginia apple crop in more than 50 years. By September 20, apple harvest in Virginia was 41 percent complete, trailing behind the 5-year average for the same period (49 percent). In MY 2026/27, the top 5 apple varieties in Virginia (Golden Delicious, York, Rome, Red Delicious, and Pink Lady/Cripps Pink) are expected to account for 62 percent of total volume, according to USApple.

The 2026 apple forecasts for **California** and **Oregon** are nearly unchanged from last season (up less than 1 percent). California is expected to produce 190 million pounds of apples this year, a 1.5-million-pound increase from 2025. Oregon's apple forecast for 2026 is 160 million pounds of apples this year, 0.5 million pounds more than last year but 40 million pounds higher than 2024. Historical data from the past five seasons indicate that California primarily channels its apples into processing (78 percent), whereas Oregon directs most of its crop to the fresh market (89 percent). For MY 2026/27, USApple forecasts Gala as California's leading variety by volume (37 percent), and Granny Smith as Oregon's top variety by volume (39 percent).

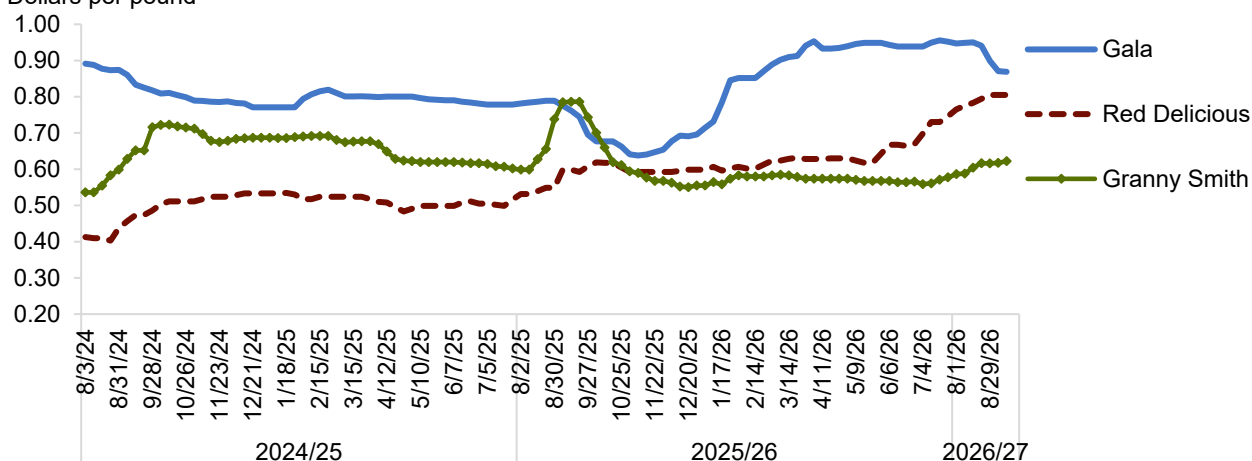
Lower than average end-of-season fresh-market apple holdings in 2025/26: Late summer marks the transition period between the end-of-season apple storage and the harvest of the new apple crop (which begins in August and continues through October). On June 1, 2026, inventories of apples intended for the fresh market were 8 percent lower than in the prior year but 8 percent above the 5-year average, according to USApple's *June 2026 Apple Tracker* report. In contrast, inventories of apples intended for the processing market were 14 percent higher than in the previous year and 20 percent above the 5-year average. Total storage volumes for Gala and Red Delicious apples were about 20 percent lower than last year, indicating tighter supplies for these leading varieties. USDA, AMS free-on-board (FOB) shipping-point prices for Gala and Red Delicious trended upward in the second half of the 2025/26 marketing year, while Granny Smith (the third largest variety by volume) remained

comparatively stable (figure 3). Industry projections suggest that Gala and Red Delicious apple production in 2026/27 will decline relative to the previous season, which would continue to support firmer pricing for these varieties.

Figure 3

FOB prices for selected varieties, August 2024–mid-September 2026

Dollars per pound



FOB = Free-on-board.

Note: Apple marketing year begins in August and ends in July of the following year. Domestic conventional apples, in 40-pound carton tray packs, item sizes 64-88, extra fancy. Includes prices from Washington, New York, and Michigan.

Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service, Market News, shipping-point prices.

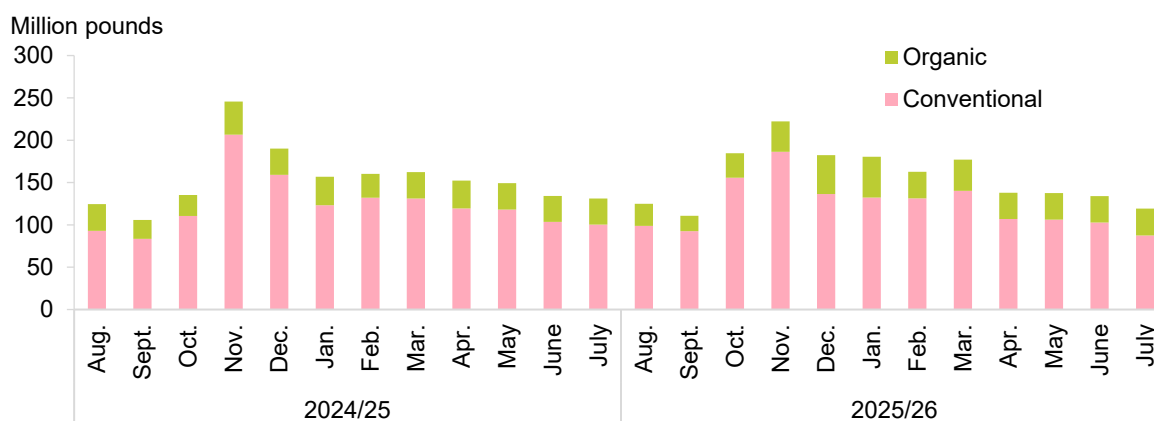
Higher prices are expected in 2026/27: Lower U.S. apple production in 2026, combined with a regionally concentrated shortfall in the eastern United States, is expected to place upward pressure on both fresh-market and processing prices. Higher transportation costs in 2026 will further increase overall marketing costs of apples shipped from packhouses in Washington State to processors and retail markets on the East Coast. These supply-side constraints and elevated cost pressures will further contribute to increased pressure on U.S. apple prices during the 2026/27 marketing year.

Fresh apple imports were lower, and exports were higher in 2025/26: The United States remained a net exporter of fresh apples in marketing year (MY) 2025/26 (August–July). U.S. fresh apple imports fell 13 percent year over year to 162 million pounds, about one-third the volume imported in 2013/14. Two reasons U.S. fresh apple imports have trended lower throughout the 2010s include higher levels of fresh-market domestic apple production and storage. U.S. fresh utilized apple production reached a record 7.9 billion pounds in 2014/15 and has exceed 6.5 billion pounds in each of the following 11 marketing years. Large apple crops have increased domestic availability and export volumes. Storage technology and the development of fresh-market apple cultivars that are suited for storage have contributed to a longer marketing window, which has dampened the demand for counter-seasonal imports from the Southern Hemisphere.

Since the mid-2000s, about 1 in 4 fresh-market apples produced in the United States each season are exported. During 2025/26, U.S. fresh apple exports totaled 1.87 billion pounds, roughly 25 percent of U.S. fresh utilized apple production (7.3 billion pounds). U.S. fresh apple exports in 2025/26 rose 1 percent, or 26 million pounds, relative to last season. Export value increased by a larger percentage than volume (up 12 percent) to a nominal record high of \$1.16 billion, reflecting a 10-percent rise in export unit value compared to 2024/25. U.S. fresh organic apple exports in 2025/26 rose 29 million pounds from 2024/25 to a record 397 million pounds, representing 21 percent of total export volume. Although the United States ships fresh apples year-round, export volumes for both conventional and organic apples typically are highest in the months following fall harvest and decline toward the end of the marketing year (figure 4).

Figure 4

U.S. fresh apple export volume peaks following fall harvest



Note: Apple marketing begins in August and ends in July of the following year.

Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census.

Increased U.S. fresh apple exports in MY 2025/26 were driven primarily by increases in shipments to North American trading partners Mexico and Canada, which accounted for 39 percent and 18 percent of total volume, respectively. During 2025/26, fresh apple exports to Mexico totaled 740 million pounds, up 14 percent from the previous season and nearly unchanged from the record high set in 2023/24 (down 0.3 percent). Apple exports to Canada rose 15 percent year over year to 343 million pounds, the largest volume in 4 years. Taiwan and Vietnam ranked third and fourth in U.S. fresh apple exports by volume, despite a year-over-year decline to both destinations (down 2 percent and 21 percent, respectively). The Dominican Republic ranked fifth in U.S. exports at 63 million pounds, with volume nearly unchanged from the prior season (down 0.5 percent). India fell out of the top 5 U.S. fresh apple export destinations to number six, as volume declined 38 percent, from 89.8 million pounds in 2024/25 to 55.4 million pounds in 2025/26.

Different U.S. apple varieties go to different export markets: According to export shipment data collected by the Washington State Department of Agriculture, the Fuji variety continued to be the top Washington apple export to Taiwan, accounting for more than 70 percent of volume. Leading apple varieties to Vietnam in 2025/26 included Cosmic Crisp (23 percent), Gala (18 percent), and Envy (16 percent). In contrast, more than 80 percent of Washington’s apple export shipments to India consisted of the lower priced Red Delicious variety.

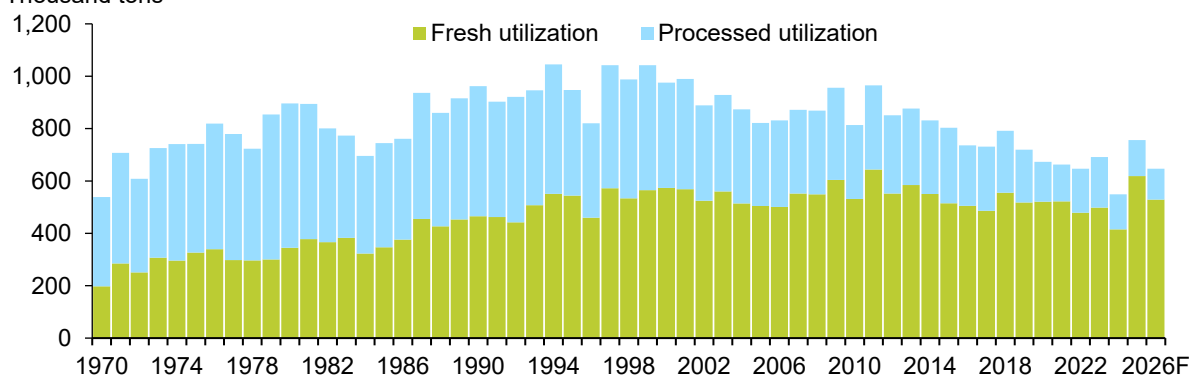
Smaller West Coast Pear Crop Is Expected in 2026

The NASS 2026 pear production forecast is 650,000 tons, a 15-percent decrease from last year’s crop. In 2026, pear production is expected to decline year over year in all three NASS-surveyed States on the West Coast: California, Oregon, and Washington. If realized, this season would mark the third lowest U.S. pear volume since 1972, higher only than 2024 (551,000 tons) and 2022 (648,000 tons). ERS expects that the share of U.S. pear production used for processing will continue to be at historically low levels. Between 1970 and the early 1990s, more than half the U.S. pear crop was processed each season, primarily as canned pear products and for fruit cocktail. Since the turn of the century, demand for processed pears has trended lower, resulting in lower total U.S. pear production and a lower share of production going to processing. In 2025, 18 percent of pear production was utilized for processing, and the remaining share went to the fresh market. If this season’s pear crop matches last year’s record low processing utilization share, about 529,000 tons would be channeled to the fresh market and 118,000 tons would go to processing (figure 5).

Figure 5

U.S. pear production utilized in fresh and processing markets, 1970–26F

Thousand tons



F = Forecast.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service.

Dual market for Bartlett pears: Reduced domestic demand for fruit processed into canned products has impacted both the U.S. pear and peach industries. The Bartlett pear is the primary variety used in commercial canning, according to historical USDA data and industry reports.

Bartlett pears (also known as Williams pears) are suited for both canning and the fresh market, unlike California clingstone peaches, which are almost exclusively canned and are not competitively marketed for fresh consumption. The ability for growers to sell Bartlett pears in fresh and processing markets means short-run changes in regional supply and demand for processing pears can impact fresh and processing prices in all three pear-producing States. Bartlett pears are harvested in mid-to-late summer, with fresh-market storage shipments generally available until February.

Washington, the largest pear-producing State, is forecast to produce 320,000 tons of pears this season, accounting for 49 percent of the U.S. crop. The 2026 forecast in Washington State is 4 percent lower than last year's bumper crop but 20 percent higher than the previous 3-year average (2022–24). The pear production forecast in **Oregon** is 210,000 tons in 2026, accounting for 32 percent of U.S. production. If this forecast is realized, it would be a 23-percent decline from 2025 and 2 percent below the previous 3-year average (2022–24). Extension and industry reports suggest that Pacific Northwest pear orchards experienced a lighter fruit set compared to the previous year, resulting in reduced yields but contributing to larger-than-average fruit size.

In **California**, pear growers are expected to produce 120,000 tons in 2026, a 23-percent decrease from last year and 20 percent below the previous 3-year average (2022–24). Industry reports indicate yields are lower this season as summer heat and an earlier-than-average harvest period led to challenges with fruit sizing and ripening. On average, more than half of California's pear production is processed each year, and ERS expects this will continue in 2026, despite the closure of one of two major fruit canning companies in California earlier this year. The California Pear Advisory Board indicated that the largest remaining fruit canning company in the State planned to increase its purchase volume of pears this year, which would largely offset the volume previously purchased by the now-closed cannery.

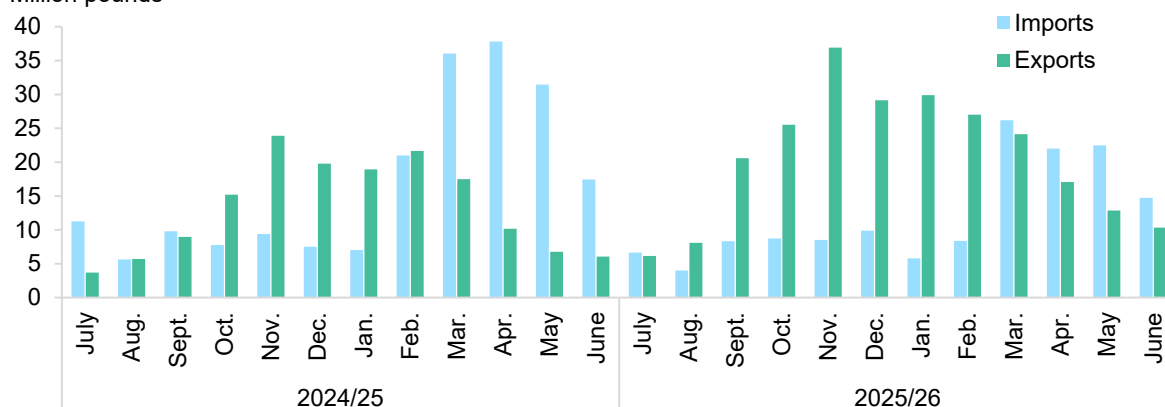
Fresh pear export volume to rebound in 2025/26, as imports fall to a 14-year low: During MY 2024/25 (July–June), a historically small U.S. pear crop limited domestic supplies, prompting imports to rise and exports to fall, and making the United States a net importer of fresh pears for the first time on record. In 2025/26, the United States regained its net exporter status as fresh pear export volume increased 56 percent from the prior season to 248 million pounds as imports fell 29 percent to a 14-year low. Southern Hemisphere pear supplier Argentina accounted for nearly half of U.S imports during 2025/26, with 90 percent of volume occurring between March and June. U.S. pear exports continued to exhibit a seasonal pattern with peak volumes in the winter months and lows in the summer (June–August), reflecting the

transition from cold storage to new crop harvest (figure 6). Almost all U.S. exports in 2025/26 continued to go to North American trading partners Mexico (63 percent) and Canada (36 percent).

Figure 6

U.S. fresh pear monthly import and export volume in 2024/25 and 2025/26

Million pounds



Note: Pear marketing begins in July and ends in June of the following year. Fresh pear trade data exclude quinces.

Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census.

Grape Production Is Expected Lower in 2026

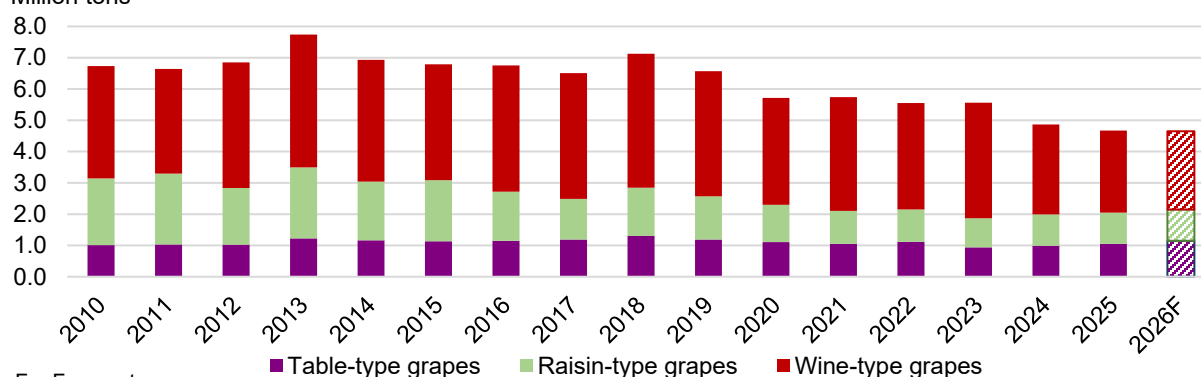
According to estimates from NASS, the U.S. grape crop is forecast to be 5.17 million tons in 2026, a decrease of 1.3 percent from 5.23 million tons in 2025 and 10 percent below the 2022–24 average of 5.76 million tons. Grape production is expected to decline year over year in all four annually surveyed States: California, Washington, New York, and Oregon.

California grape production estimates vary by type in 2026: The California grape crop is forecast to be 4.65 million tons in 2026, just below the previous year's estimate of 4.67 million tons. If realized, this would be the third consecutive year of lower grape production in California and a decrease of 40 percent from the 2013 peak of 7.74 million tons (figure 7). Lower

Figure 7

2026 California grape production expected 40 percent below 2013 peak

Million tons



F = Forecast.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service.

processed production of both wine-type and raisin-type grapes has resulted in a reduction in California grape output relative to 2013 levels. NASS estimates that California's crop is 54 percent wine-type grapes, 25 percent table-type grapes, and 22 percent raisin-type grapes in 2026.

California **wine-type grape** production is expected to be 2.5 million tons in 2026, a decrease of 5 percent from 2.62 million tons in 2025 and 25 percent below the 2022–24 average of 3.32 million tons. The 2026 wine-type grape production forecast is 42 percent below the 2018 peak of 4.29 million tons. Wine-type grape bearing acreage in California declined from a peak of 590,000 acres in 2018 and 2019 to 510,000 acres in 2025. In 2025, California wine-type bearing acreage decreased by 30,000 acres from the prior year, marking the third season in a row producers reduced acreage.

California **table-type grape** production is expected to be 1.15 million tons in 2026, an increase of 10 percent from 1.05 million tons in 2025 and 13 percent above the 2022–24 average of 1.02 million tons. The 2026 table grape production forecast is 12 percent below the 2018 peak of 1.3 million tons. The 2026 table grape production forecast represents the third consecutive year of increased production since remnants of Hurricane Hilary negatively impacted table grape harvest in August 2023, lowering table grape production below 1 million tons for the first time since 2009. If this season's table-type grape crop matches last year's fresh-market utilization share, about 964,000 tons (84 percent) would be channeled to the fresh market.

California **raisin-type grape** production is expected to be 1 million tons in 2026, unchanged year over year. The 2026 raisin-type grape production forecast is 66 percent below the 2000 peak of 2.92 million tons. Raisin availability in the United States peaked in the late 1980s and has declined since, due in part to increased competition from other dried fruit (such as cranberries and blueberries) as well as increased year-round availability of fresh fruit.¹

Washington's juice grape production is higher, wine grape production is lower in 2026:

The Washington State grape crop is forecast to be 255,000 tons in 2026, a decrease of 1.5 percent from 259,000 tons in 2025. If realized, this estimate would mark the fourth consecutive year of declining grape production in Washington, as wine-type grape production has trended downward since peaking in 2016 (figure 8). NASS estimates Washington's crop to be 61 percent juice-type grapes and 39 percent wine-type grapes in 2026; wine grapes make up a

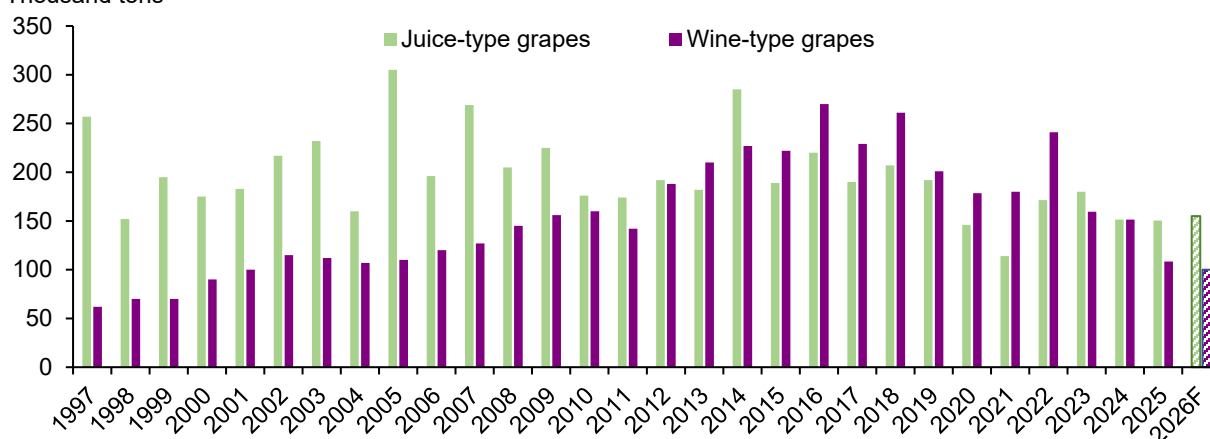
¹ For more information on the raisin industry, see the special article, "Through the Grapevine: U.S. Raisin Statistics" published in the ERS *Fruit and Tree Nuts Outlook*: March 2023.

declining share of Washington's crop, down from about 54 percent on average from 2018 to 2020.

Figure 8

Washington juice-type and wine-type grape production, 1997–2026F

Thousand tons



F = Forecast.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service.

Washington State **juice-type grape** production is expected to be 155,000 tons in 2026, an increase of 3 percent from 150,500 tons in 2025 but 8 percent below the 2022–24 average of 167,700 tons. Historically, Washington State's grape industry was primarily juice-type grapes. From 2015 to 2022, wine-type grape production exceeded juice grape production in Washington State. But since 2023, juice-type grape production has met or surpassed wine-type grape volume each year.

Washington State **wine-type grape** production is expected to be 100,000 tons in 2026, a decrease of 8 percent from 108,500 tons in 2025 and 46 percent below the 2022–24 average of 184,000 tons. According to the Washington State Wine Commission's *2025 Grape Production Report*, the 2025 wine grape crop was evenly split between red wine and white wine varieties. Red wine grape volume decreased by 35 percent year over year in 2025, while white wine varieties decreased by 20 percent. Cabernet Sauvignon (a red wine variety) remained the top variety grown in Washington in 2025, accounting for 22 percent of the State's wine grape production. Cabernet Sauvignon received the highest average price per ton of any wine grape variety at 3,169 dollars per ton. Chardonnay (a white wine variety) ranked second in terms of volume and accounted for 17 percent of Washington State's wine grape crop in 2025.

New York and Oregon grape production is expected to be lower in 2026: The New York grape crop is forecast to be 170,000 tons in 2026, a decrease of 13 percent from the 195,500 tons produced in 2025. Almost all of New York's grape production is destined for processing use, primarily for grape juice (historically about 70 percent) and wine (about 30 percent). New

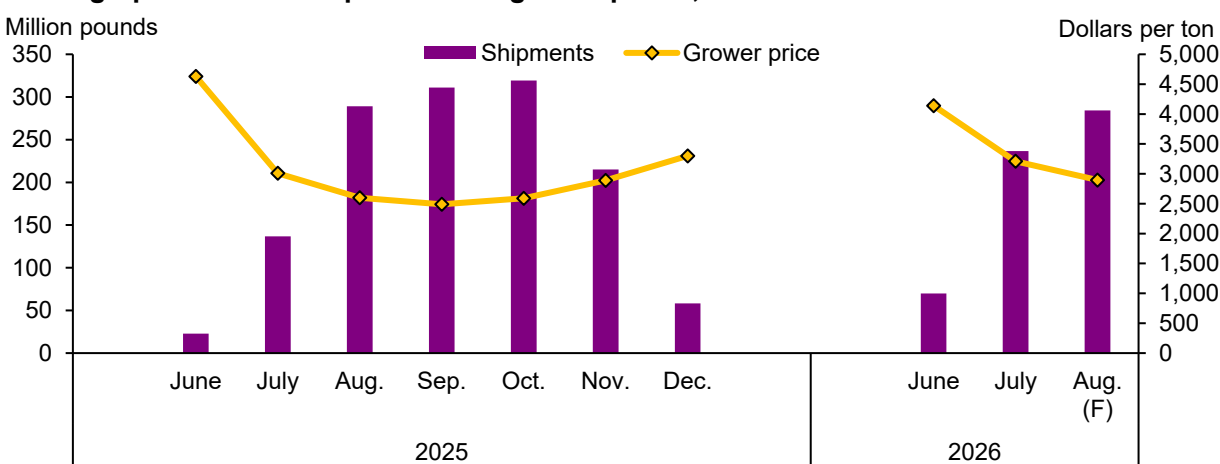
York's grape juice industry has faced challenges this year following the cancellation of grape contracts in March 2026 by Refresco, a beverage processing company with a location in Chautauqua County in westernmost New York State. ERS expects the closure of a major grape juice processing facility this season will reduce demand for the 2026 juice-type grape crop.

The **Oregon** grape crop is forecast to be 92,000 tons in 2026, a decrease of 16 percent from 109,000 tons in 2025. Historically, almost all of Oregon's grape production is processed into wine. According to the University of Oregon's *2025 Oregon Vineyard and Winery Census*, Pinot Noir (a red wine variety) remained the top variety grown in Oregon in 2025, accounting for 58 percent of the State's wine grape production. The University of Oregon report indicates that a higher-than-average share of grapes was left unharvested during the 2025 season, largely due to canceled contracts and a lack of buyers for wine-type grapes.

Fresh grape shipments are off to an early start: U.S. fresh grape shipments have exceeded historical averages so far this season, primarily due to an early start to harvest in California. Season to date through the second week of September 2026 (week 37), domestic fresh grape shipments were 20 percent higher than the 2023–25 average. Unseasonably warm temperatures accelerated crop development, resulting in California's grape harvest beginning roughly 3 weeks ahead of the typical schedule. This early harvest drove June and July shipment volumes significantly above last year's levels (figure 9). In August 2026, shipment volumes remained steady compared to the same month last year. Although cumulative domestic shipments are elevated through August, ERS expects California's table grape season to conclude earlier than usual, resulting in lower levels of end-of-season shipment volumes.

Figure 9

Fresh grape domestic shipments and grower prices, June–December



F = Forecast.

Note: August 2026 grower price forecast is based on ERS calculations using USDA, Agricultural Marketing Service, *Market News* shipping-point prices.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Agricultural Prices* and USDA, Agricultural Marketing Service, *Market News*.

Fresh grape grower prices are typically lowest when domestic supply is highest from August through October. Fresh market grape prices from NASS were lower year over year in June before exceeding last year's levels in July. USDA, AMS FOB shipping-point prices suggest average prices fell month over month from July 2026 to August 2026 but remained above average monthly prices in August 2025. However, despite the month-to-month decline in August, an earlier than average end to this season's harvest may lead to upward pressure on monthly prices as the domestic season concludes.

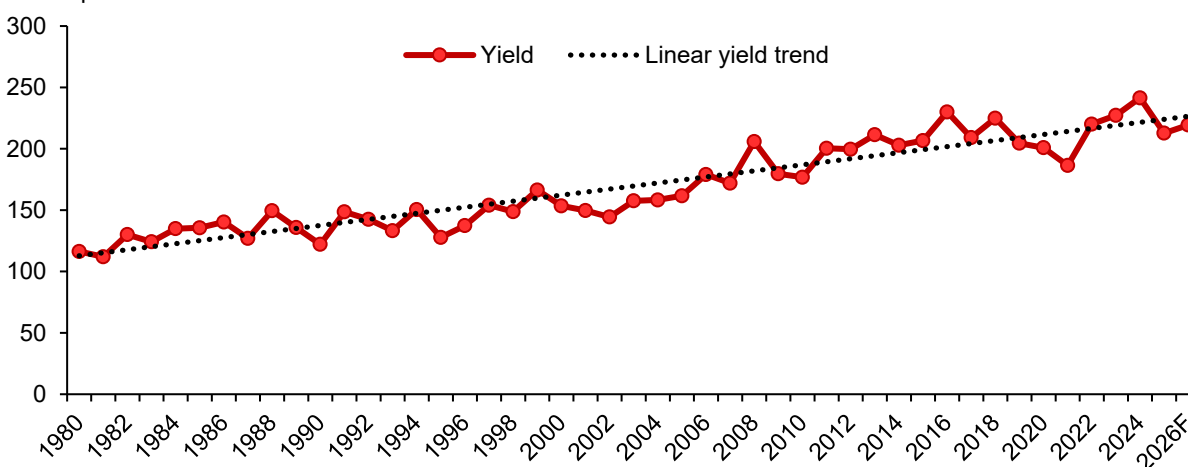
Cranberry Production Is Expected Higher in 2026

According to estimates from NASS, the U.S. cranberry crop is forecast to be 7.87 million barrels (or 787 million pounds) in 2026, an increase of 5 percent from 7.51 million barrels in 2025 but 5 percent below the 2022–24 average of 8.3 million barrels. ERS expects about 7.54 million barrels (or about 96 percent of the cranberry crop) to be processed and about 301,000 barrels for fresh-market use based on recent-year utilization and market-allocation averages. If this year's cranberry production forecast is realized and harvested area is similar to the 3-year average, 2026 U.S. cranberry yield would rise year over year to nearly match the linear trendline yield of 220 barrels per acre (figure 10).

Figure 10

Cranberry yields by the barrel, 1980 to 2026F

Barrels per acre



F = Forecast. One barrel = 100 pounds.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service.

The **Wisconsin** cranberry crop is forecast to be 4.80 million barrels in 2026, an increase of 4 percent from 4.61 million barrels in 2025 but 5 percent below the 2022–24 average of 5.05 million barrels. Wisconsin is the top cranberry producing State in the United States and is expected to account for 61 percent of U.S. production this year. Wisconsin cranberry production

peaked in 2016 at 6.13 million barrels when harvested area was estimated to be 21,100 acres—2,000 acres higher than the 2025 estimate of 19,100 acres.

The **Massachusetts** cranberry crop is forecast to be 1.9 million barrels in 2026, a decrease of 1 percent from 1.93 million barrels in 2025 and 12 percent below the 2022–24 average of 2.16 million barrels. Massachusetts ranks second in U.S. cranberry production and is expected to account for 24 percent of the 2026 forecast. NASS typically reports crop conditions for Massachusetts cranberries from late July through October. While the production forecast is only 1 percent lower year over year, crop conditions suggest crop quality is below normal. From late July through most of August, 100 percent of the cranberry crop was rated in poor condition. By the second week of September, 35 percent of the crop was rated in fair condition, and 45 percent was rated in poor condition.

The **New Jersey** cranberry crop is forecast to be 610,000 barrels in 2026, an increase of 36 percent from 449,000 barrels in 2025 and 8 percent above the 2022–24 average of 563,000 barrels. If realized, the 2026 crop would be the fourth largest in the past two decades.

The **Oregon** cranberry crop is forecast to be 560,000 barrels in 2026, an increase of 6 percent from 529,000 barrels in 2025 and 7 percent above the 2022–24 average of 522,000 barrels. If realized, the 2026 crop would be the fifth largest in the past two decades and 7 percent below the 2024 record of 600,000 barrels.

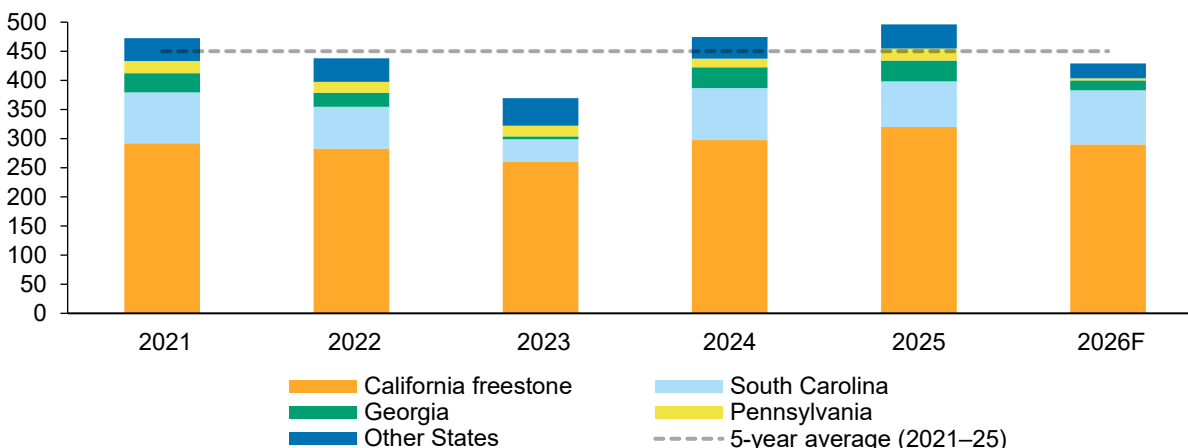
U.S. Fresh Peach Supply Is Lower in 2026

The NASS August *Crop Production* forecast for U.S. peach production in 2026 is 604,200 tons, a 15-percent decrease from the previous year. In California, the top peach producing State, freestone and clingstone-type peach production are both forecast to drop from the previous year (down 9 and 17 percent, respectively). Excluding California, NASS does not report State-level peach production by separate freestone and clingstone categories, but most consist of freestone-type peaches grown for the fresh market. Peach production in the other 6 NASS-surveyed States is projected to total 139,200 tons. When all NASS-surveyed States are combined with California's freestone crop forecast, estimated freestone production (a proxy for U.S. fresh peach production) is 14 percent lower than last year and 5 percent lower than the 2021–25 average (figure 11).

Figure 11

California freestone and six-State peach production is forecast lower in 2026

Thousand tons



F = Forecast.

Note: Excludes California clingstones. Other States include Colorado, Michigan, New Jersey, and Washington. Starting in 2024, the annual peach survey in Washington was discontinued.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Noncitrus Fruit and Nuts Summary (various issues)* and *Crop Production* (August 2026).

Peach production is lower than last season in six of the seven surveyed States: In 2026, the freestone peach production forecast in California is 9 percent lower than in 2025 but 1 percent higher than 2024. In Georgia, early blooming peach varieties reportedly received freeze damage in March, resulting in lower yields. The 2026 Georgia production forecast is 17,000 tons, down 52 percent from last year but still larger than the heavily freeze-damaged crop in 2023. In the mid-Atlantic, freezing temperatures in late April sharply lowered output in Pennsylvania (down 82 percent) and New Jersey (down 62 percent). Damage from spring freezes in Michigan also contributed to lower production this season (down 30 percent), although the Michigan State Extension notes that impacts varied across the State. Colorado peach production is also forecast 20 percent lower than last year, as a warm early spring followed by cold temperatures damaged fruit in some orchards.

South Carolina peach production is the largest in more than a decade: South Carolina is the second ranked U.S. peach-producing State, behind California. In 2026, South Carolina is the only surveyed State where production is forecast to be higher than last year. The 2026 South Carolina peach forecast is 93,000 tons, up 18 percent from 2025 and the largest crop since 2011. Unlike regions to the north and south of the State, South Carolina peach orchards were largely unaffected by freeze events this year. Clemson Agricultural Extension reports indicate this year's crop was generally in good condition throughout the season. Growers experienced extreme heat this summer, but drier conditions helped reduce disease and insect pressure. Peach harvest in South Carolina typically starts in May and ends in early September.

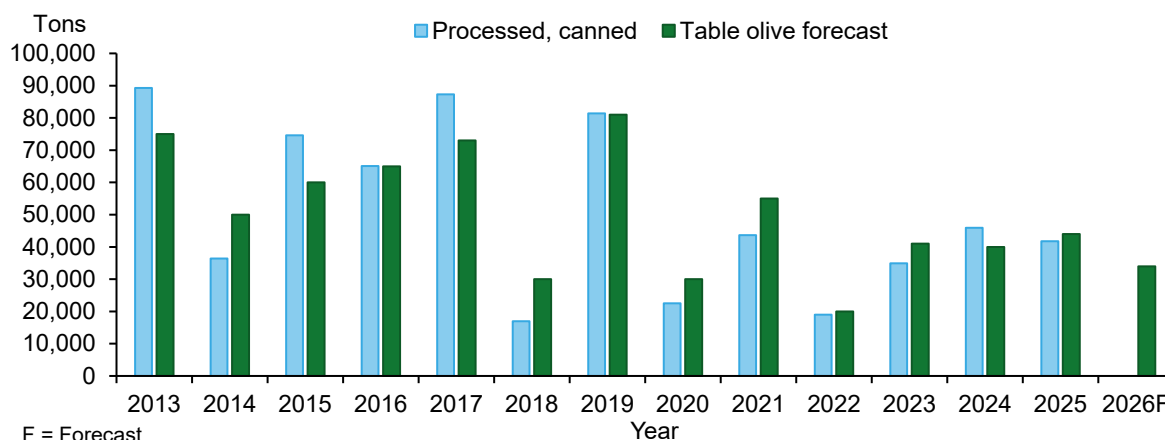
Update on California's clingstone peach season: An estimated 95 percent of California's annual clingstone production is canned each season. As discussed in the *Fruit and Tree Nuts Outlook: July 2026*, the closure of a major canning facility before the 2026 harvest resulted in reduced demand for clingstone peaches. Based on the final weekly clingstone peach crop delivery report published by the California League of Food Processors' (CLFP) on August 29, 2026, total delivered tonnage to peach processors was about 151,700 tons, a 28-percent decline from last year. The California Canning Peach Association estimates clingstone yield was 6 percent below last year's level, and fruit sizing was smaller than average. However, industry reports indicate that removal of bearing acreage during the 2026 calendar year, likely in response to the cannery closure, is the primary driver behind this year's decline in production.

California's 2026 Table Olive Forecast

Most California table olives are processed as canned olives. The 2026 California table olive forecast is 34,000 tons, 23 percent lower than last year's crop of 43,912 tons, according to the NASS 2026 California Table Olive Probability Survey Report (figure 12). The Manzanillo olive variety production forecast represents 94 percent (32,000 tons) of total volume, followed by Sevillano (1,900 tons) and other varieties (100 tons).

Figure 12

California olive production processed for canning compared to table olive production forecasts



F = Forecast.

Note: Processed canned olives includes processed utilized production of canning and limited size olives. NASS will publish 2026 processed olive utilized production data in the *Noncitrus Fruits and Nuts 2026 Summary* released in May 2027.

Source: USDA, Economic Research Service using data from the USDA, National Agricultural Statistics Service *Noncitrus Fruit and Tree Nuts Annual* and various USDA, NASS table olive reports.

While annual table olive production is variable due to the alternate bearing nature of olive trees, lower table olive volume over the last two decades is largely attributable to the gradual decline in table olive bearing acreage. Table olive bearing acreage in 2026 is forecast at 11,700 acres, about half the acreage estimate in 2013 (25,000 acres). However, the decrease in California

table olive acreage has been more than offset by an increase in olive oil-type bearing acreage. In 2025, total olive bearing area reached a record 44,000 acres, with ERS estimating about three-quarters of which consisted of olive oil-type cultivars (32,000 acres), as opposed to table olives destined for canning.

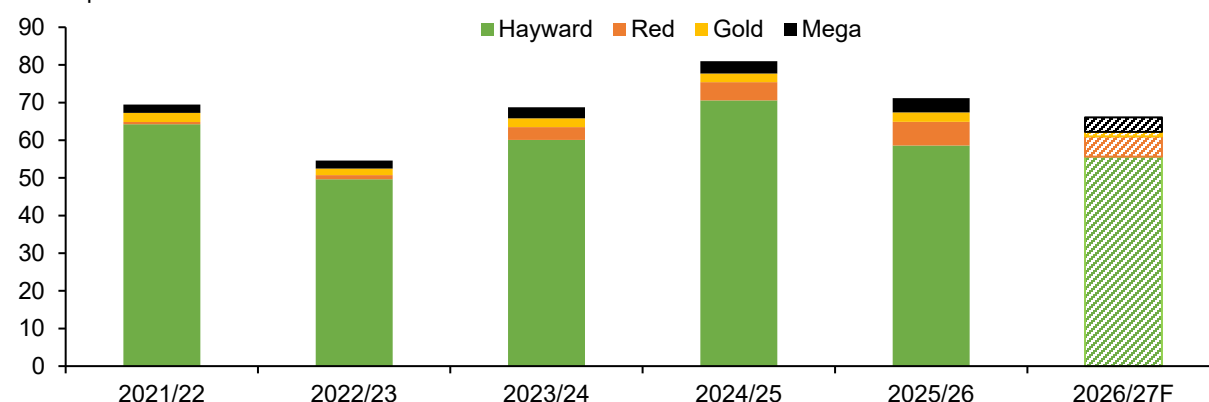
Kiwifruit Availability Reaches Record High in 2025/26

California kiwifruit is harvested from late September through mid to late November. Based on data from the Kiwifruit Administrative Committee, the California kiwifruit preliminary production estimate for 2026/27 is 66.1 million pounds, a decrease of 7 percent from 71.2 million pounds in 2025/26 (figure 13). The dominant kiwifruit variety produced in California is the Hayward, which is primarily grown in the northern Sacramento Valley—specifically in Butte, Sutter, and Yuba Counties—where chill hours are suitable for kiwifruit production. Hayward kiwifruit is expected to account for 84 percent of the 2026/27 crop forecast. While Hayward is by far the top variety by volume, production of Red and Mega kiwifruit varieties has increased in recent years.

Figure 13

California kiwifruit production by variety, 2021/22 to 2026/27F

Million pounds



F = Forecast.

Source: USDA, Economic Research Service based on data from Kiwifruit Administrative Committee.

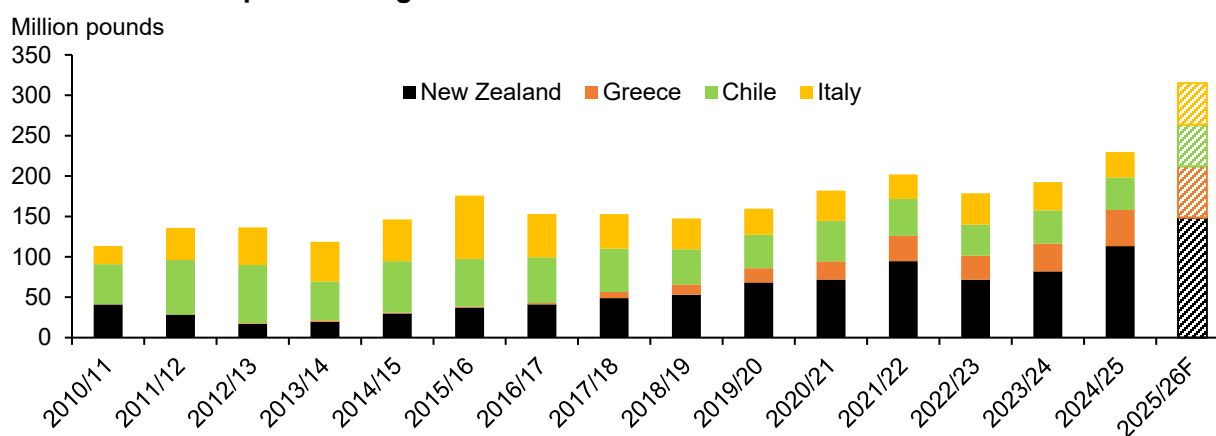
Based on data from the Food and Agriculture Organization of the United Nations, China, New Zealand, and Italy accounted for roughly three-quarters of global kiwifruit production in recent years (2022–24). The United States ranked 9th in 2024, producing less than 1 percent of global kiwifruit volume. As demand for fresh kiwifruit in the United States has increased, U.S. imports from major-producing countries have also increased. Almost all fresh kiwifruit imports to the United States come from four suppliers: New Zealand, Greece, Chile, and Italy.

In recent years, imports have accounted for about 81 percent of domestic fresh kiwifruit availability. In 2025/26, ERS expects fresh kiwifruit import volume to reach a record high (figure 14). As of the first 10 months of the marketing year (October 2025–July 2026), kiwifruit import

volume totaled 292 million pounds, exceeding the previous 12-month marketing year record of 230 million pounds set in 2024/25. The increase was driven by record high kiwifruit imports from the top two suppliers, New Zealand and Greece. Kiwifruit imports from Chile were up 17 percent, and imports from Italy rose 38 percent relative to 2024/25. Almost two-thirds of total fresh kiwifruit import volume so far in 2025/26 originated from Southern Hemisphere suppliers—primarily New Zealand (50 percent of total imports) and Chile (17 percent). Shipments from these countries are concentrated in the spring and summer months, whereas imports from Greece and Italy typically arrive between November and April. With kiwifruit imports at record levels, ERS estimates U.S. fresh kiwifruit per capita availability will surpass 1 pound per person for the first time in 2025/26.

Figure 14

Fresh kiwifruit imports the highest on record in 2025/26F



F = Forecast.

Note: Kiwifruit marketing begins in October and ends in September of the following year.

Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

Tree Nuts Outlook

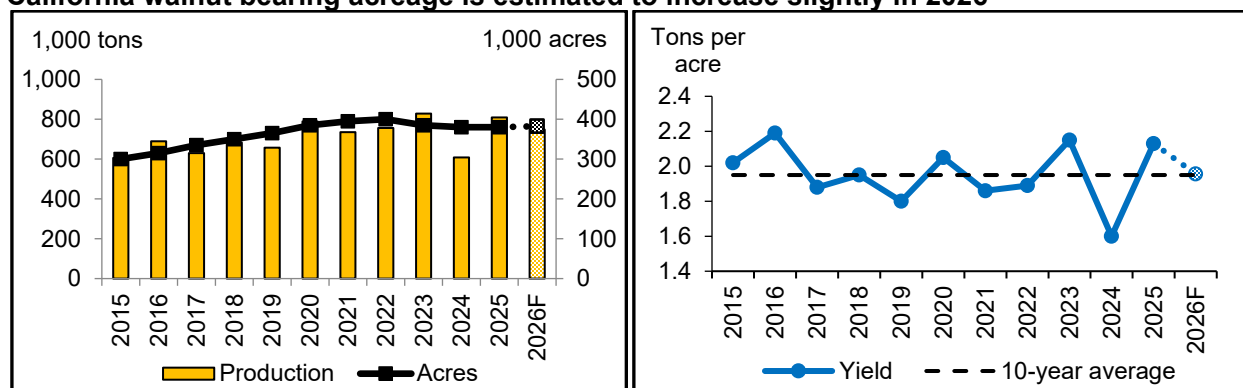
California's Walnut Harvest Is Underway

The harvest season for walnuts began in September and can continue as late as November. Authoritative walnut yield and production forecasts will be available in early October when the NASS *California Walnut Objective Measurement Report* is published. Until then, production forecasts are driven by information about growing conditions and bearing-acreage expectations during the 2026 walnut growing season.

After 3 years of flat or declining values, walnut bearing acres are forecast to increase slightly in 2026: The Land IQ April 2026 *Standing Acreage Report* forecasts that there will be 382,535 bearing acres of walnuts in 2026 (figure 15). If so, this number would be a 2,535-acre (0.7-percent) increase from the 380,000 acres that NASS reported were bearing in 2025. An increase in 2026 acreage would be a change from the recent trend. Walnut acreage dropped in 2023 and 2024 (due to low output and high input prices); it was unchanged in 2025.

Figure 15

California walnut bearing acreage is estimated to increase slightly in 2026



F = Forecast.

Note: The 2026 production estimate was calculated by multiplying 10-year-average yields by the bearing acreage estimate for 2026 Standing Bearing Acreage from the Land IQ 2026 *Standing Acreage* report. Production and yields are in-shell equivalents.

Source: USDA, Economic Research Service using data from the USDA, National Agricultural Statistics Service, *California Walnut Objective Measurement Report* and the Land IQ 2026 *Standing Acreage* report (as of April 30, 2026).

Generally, conditions were favorable for walnut production in 2026. Walnut orchards in California's Central Valley accumulated more chill hours in 2025/26 than in 2024/25. There was adequate precipitation throughout the 2026 growing season, with higher-than-average water levels in California's reservoirs, and generally good soil moisture. Moreover, there was no extreme heat during the summer of 2026 (as there had been in July 2024).

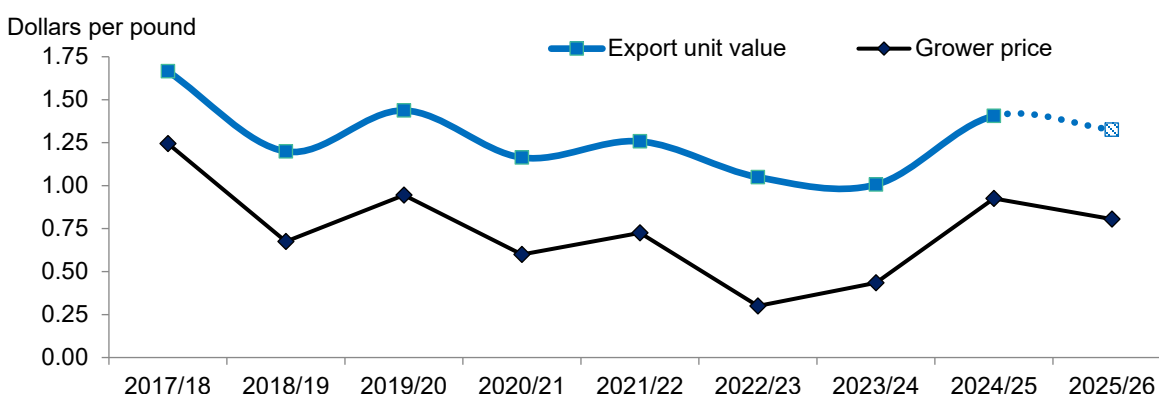
If walnut yields are similar to the 10-year average (1.95 tons per acre) and bearing acreage totals 382,535 acres in 2026, then walnut production in 2026 would be approximately 750,000

tons. If so, this would be about a 7-percent drop from the 809,000 tons produced in 2025. However, if yields are higher than the 10-year average, walnut production could exceed 800,000 tons.

Although the marketing year for walnuts extends from September through August, NASS defines the marketing season for domestically produced walnuts as September 15 to November 10. Historically, this is when much of California's walnut crop is harvested and marketed. Data on the average prices received by domestic producers for the 2026/27 crop will not be reported by NASS until the *Noncitrus Fruits and Nuts 2026 Summary* is published in May 2027. However, NASS season average prices and trade data can provide insights into how walnut prices changed in 2025/26 (figure 16).

Figure 16

The average unit value of U.S. walnut exports rose in marketing year 2024/25, but has trended lower in 2025/26



Note: Shelled walnut export unit values have been converted into dollars per pound (on an in-shell basis). Average prices are weighted by the monthly volume exported. Average export unit values for 2025/26 are based on data from September 2025 through July 2026 (the most recent data available when this report was published).

Source: USDA, Economic Research Service using data from the USDA, National Agricultural Statistics Service and the U.S. Department of Commerce, Bureau of the Census.

As documented in prior ERS *Fruit and Tree Nut Outlook* reports, inflation-adjusted (i.e. “real”) walnut prices reached record-breaking lows during the 2022/23 crop year (September–August). Prices rose in 2023/24, and that growth continued in 2024/25 (following a 2024 crop that was substantially smaller than usual). In 2025 walnut production increased by 33 percent, which contributed to a 13-percent decrease in walnut prices in 2025/26.

From September 2025 through July 2026, the weighted-average unit value (i.e. value of 1 pound) of U.S. walnut exports was \$1.33 per pound on an in-shell basis. This value is 5-percent lower than the average value of walnut exports over the same time period in market year 2024/25 (which was \$1.41 per pound). Notably, domestic walnut producers do not receive the full value of export sales (some of which go to processors, retailers, importers and exporters, and/or packers).

Assuming a conversion factor of 0.451 (from in-shell to shelled), recent trade data indicate that approximately 479 million pounds of walnuts on a shelled basis were exported from September 2025 through July 2026. This number is nearly a 37-percent increase from walnut export volumes during the same period last year. If export volumes rise at expected rates through August, then total export volume for the 2025/26 trade year should reach approximately 500 million pounds. If so, this number would break the previous export record of 486 million pounds set in 2021. Notably, on August 24, 2026, USDA announced its intent to purchase up to 30 million dollars of walnuts under USDA's Section 32 authority. Additional domestic shipments in early 2026/27 would contribute to lower stocks and support producer prices during the current marketing year.

During the 2024/25 marketing year, China became the world's largest walnut exporter, surpassing the United States. However, China's walnut producers tend to ship walnuts to different markets than U.S. producers (because China does not produce large volumes of light, relatively less bitter walnut varieties, such as Chandler and Hartley). From September 2025 through July 2026, data from Trade Data Monitor indicate that China is still the international leader. The United States is the world's second largest walnut exporter (in terms of volume). Chile and Turkey are the third and fourth largest global walnut exporters, respectively.

The outlook for the 2027/28 crop (which will be harvested in September 2027) depends heavily on weather during the end of 2026 and through the 2027 growing season. There is considerable uncertainty about how dramatically the developing super El Niño will warm California this winter, how chill hours (i.e. the hours of cool weather that a walnut tree needs during the winter to grow normally during the spring and summer) and snowpack will be affected, and whether drought and heat stress will affect walnuts grown in California's Central Valley in the summer of 2027.

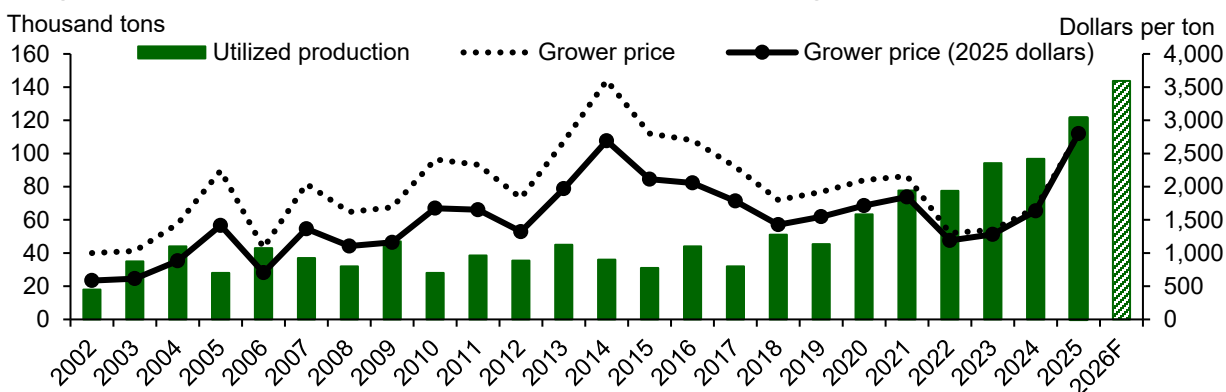
Record Hazelnut Crop Is Expected in 2026

U.S. hazelnut production set a record in 2025: Oregon hazelnut production reached a record 121,500 tons on an in-shell basis in 2025. This estimate is an increase of 26 percent from the previous record of 96,800 tons set in 2024 and surpasses 100,000 tons for the first time. The 2025 hazelnut production estimate reflects record high bearing acreage in Oregon, coupled with higher yields year to year. Hazelnut bearing acreage reached 92,000 acres in 2025, an increase of 5 percent year over year from the previous record of 88,000 acres in 2024. Hazelnut yields were 1.32 tons per acre in 2025, an increase of 20 percent from 1.10 tons per acre in 2024.

Grower prices for U.S. hazelnuts are the highest in nearly a decade: Hazelnut grower prices were \$2,800 per ton in 2025, a 67-percent increase year over year and the highest since 2014 when adjusted for inflation (figure 17). An increase in grower prices pushed the value of production upward to \$340.2 million in 2025, more than double year over year from \$162.6 million in 2024. Freeze events in Turkey, the world's largest hazelnut producer, resulted in widespread damage for the hazelnut crop in April 2025. Lower hazelnut production in Turkey increased demand for U.S. hazelnut exports and helped put upward pressure on grower prices.

Figure 17

Oregon's hazelnut production is expected to reach record high in 2026



F = Forecast.

Note: Grower prices are adjusted for inflation using the U.S. Bureau of Economic Analysis, gross domestic product implicit price deflator rebased to 2025 dollars by the USDA, Economic Research Service.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, U.S. Bureau of Economic Analysis, and the Hazelnut Marketing Board.

Record U.S. hazelnut exports in 2025/26: The United States has been a net exporter of hazelnuts each year since the 2003/04 marketing year (July–June). U.S. hazelnut exports reached a record 78.1 million pounds on a shelled basis in 2025/26, an increase of 45 percent from the previous record of 54.0 million pounds in 2024/25. Export growth has been driven by shelled hazelnuts rather than in-shell hazelnuts, with shelled hazelnut export volume increasing from 7.8 million pounds in 2020/21 to 73.4 million pounds in 2025/26.

2026 Oregon hazelnut crop is expected to surpass 2025 record production: The 2026 Oregon hazelnut harvest began in September and will extend into October. NASS will release its 2026 hazelnut production estimate in the *Noncitrus Fruits and Nuts 2026 Summary* in May 2027. Based on preliminary data from the Hazelnut Marketing Board's *Subjective Yield Survey*, the 2026 hazelnut crop is forecast to be about 143,720 tons (in-shell)—another record setting crop, if realized. New plantings of hazelnuts in Oregon peaked from 2016 to 2018, averaging about 10,000 acres each year. Given that hazelnut orchards generally require 4 or 5 years to reach commercial bearing, with yield potential continuing to increase as trees mature through roughly 10 to 12 years, the acreage added during this peak expansion period is now transitioning into full productive maturity.

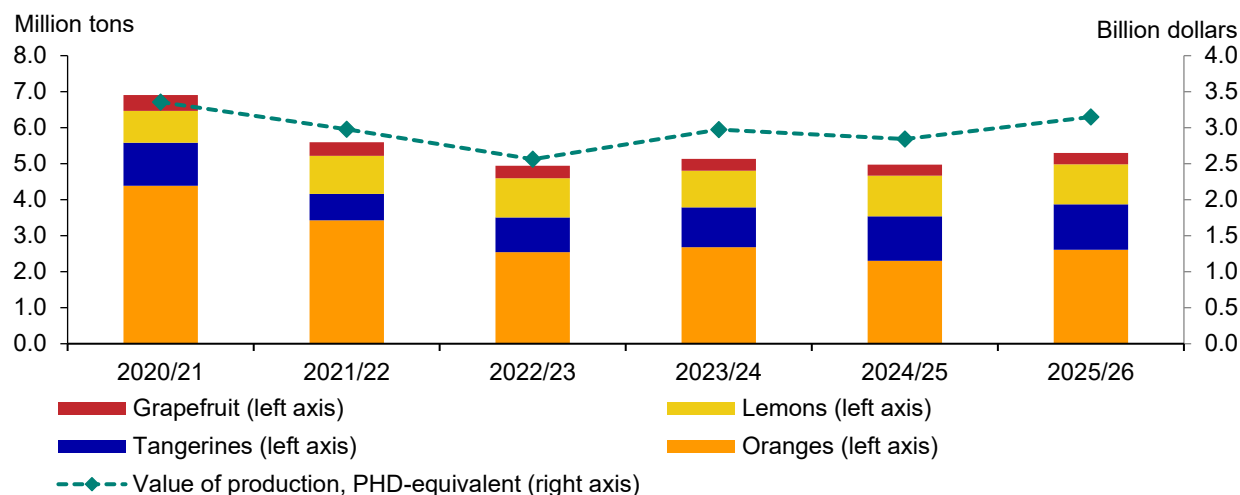
Citrus Fruit Outlook

U.S. Citrus Production Rose Higher in 2025/26

The final NASS citrus production estimates for the 2025/26 crop year were published August 27, 2026. Total domestic citrus production (oranges, grapefruit, lemons, and tangerines) reached 5.3 million tons at an estimated value of \$3.15 billion (figure 18). Total citrus production volume in 2025/26 citrus crop year was up 6.5 percent over 2024/25. All citrus commodities (except for lemons) experienced an increase over 2024/25. Production of early and mid-season oranges was up 12 percent and Valencia orange production was up 17 percent. Grapefruit production was up 3 percent, and production of tangerines was up 2 percent, while lemon production was down 2 percent.

Figure 18

Total U.S. citrus production in 2025/26 reaches 5.29 million tons, valued at \$3.15 billion



PHD = Packinghouse door.

Note: The citrus crop year begins with the bloom of the first year listed and ends with the year harvest is completed.

Source: USDA, Economic Research Service based on data from the USDA, National Agricultural Statistics Service, *Citrus Fruit Summary*, various issues.

Orange production went up in 2025/26: Orange production rose in 2025/26, driven mainly by higher yields in California. Although California's orange acreage has generally declined since 2002/03, yields have trended upward. In 2025/26, yields reached 371 boxes per acre, up 17 percent from 2024/25, supported by favorable weather and an on-year crop. Florida's orange sector performed better than expected, despite two winter freeze events. Because early-season harvest (non-Valencia) was mostly complete when the freeze events occurred, production risk was largely confined to Valencia oranges. However, Valencia production rose 6.5 percent to 8.18 million boxes due to strong yields, and non-Valencia output increased relative to the prior season. Overall, Florida orange yields reached a 4-year high (102 boxes per acre), though still historically low, reflecting growers' efforts to manage citrus greening.

In Texas, 2025/26 orange production totaled 1.09 million boxes, up 28 percent from 2024/25. Early-season drought in the Rio Grande Valley combined with heavy fruit set in an on-year contributed to smaller sized fruit, but late-season fruit sizing improved following spring rains. Yields increased 36 percent year over year, which offset a 6-percent decline in bearing acreage. Orange acreage in Texas has continued to trend lower over the last decade, falling from 8,000 acres in 2016/17 to 5,100 in 2025/26.

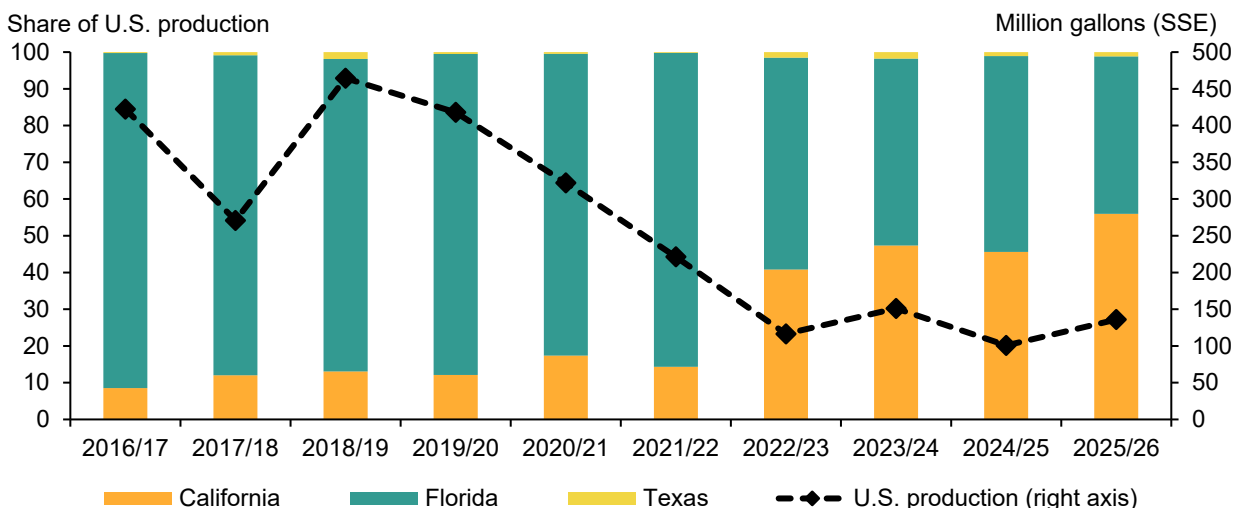
Preliminary per capita fresh orange availability in 2025/26 is forecast at 7.7 pounds, a 3-year high supported by a larger U.S. crop, record imports, and low exports. More than half of the 2025/26 U.S. orange crop went to the fresh market. California remained the leading supplier at 1.29 million tons, accounting for about 93 percent of U.S. fresh-market orange production. Florida's share of fresh-market oranges has dropped sharply in recent years, accounting for less than 5 percent of U.S. production in 2025/26. Texas—despite most of its crop going fresh—accounted for only 2.5 percent U.S. fresh-market oranges in 2025/26.

Fresh U.S. orange imports for November 2025–July 2026 totaled 346 million pounds, driven by increases from Chile, South Africa, and Morocco. Over the last 3 years (2022/23–2024/25) these countries, along with Mexico, supply about 93 percent of U.S. fresh orange imports. Season-to-date fresh orange exports totaled 664 million pounds, down 2 percent from the same period a year ago. The decline in U.S. orange exports this season was mainly driven by reduced shipments to South Korea, Taiwan, and Japan—more than offsetting increased exports to Canada and Mexico.

U.S. orange juice production shifts to California: Florida once represented about 90 percent of annual U.S. orange juice production, but declining output has shifted market share to California and Texas (figure 19). In 2025/26, California is projected to lead U.S. orange juice production for the first time since the invention of frozen concentrated orange juice (FCOJ), producing about 76 million single-strength gallons or 56 percent of domestic juice production. This rise comes even as more Florida oranges move into processing. California's processed orange production reached a 19-year high in 2025/26 of 17.3 million boxes, or about 1.38 billion pounds. In part due to the higher volume of oranges going to processing in 2025/26, the average on-tree equivalent grower prices for processing oranges dropped year over year. The average on-tree equivalent grower prices for a box of processing oranges in 2025/26 was \$4.19, more than a 50-percent decrease from last season.

Figure 19

California's share of U.S. orange juice production reaches 56 percent in 2025/26



SSE = Single-strength equivalent.

Source: USDA, Economic Research Service based on data from Florida Department of Citrus weekly processor reports and USDA, National Agricultural Statistics Service, *Citrus Fruit Summary*, various issues.

U.S. imports of orange juice are down 10 percent season to date (October 2025–July 2026), totaling about 431 million single-strength equivalent gallons (SSE). Brazil and Mexico continued to remain the primary sources of orange juice for the U.S. market in 2025/26, together accounting for about 90 percent of U.S. import volume. Costa Rica accounted for 6 percent of U.S. orange juice import so far this season, with volume more than double compared to the same period a year ago. U.S. orange juice exports during the same period dropped by 22 percent to 25 million gallons SSE due to year-over-year declines to top markets Canada (down 16 percent) and Mexico (down 45 percent). U.S. orange juice exports to Costa Rica and the Dominican Republic increased by 14 and 24 percent, respectively, together accounting for about 9 percent of season to date U.S. export volume. With U.S. orange juice exports down for both frozen concentrated and single-strength liquid orange juice categories, ERS expects total U.S. orange juice export volume in SSE gallons in 2025/26 (October 2025–September 2026) will fall to the lowest level in at least 56 years.

While various types of orange juice are sold in the United States, the Florida Department of Citrus breaks orange juice into two primary categories: frozen concentrated orange juice (FCOJ) and single-strength liquid (SSOJ) varieties. ERS projects U.S. orange juice-ending stocks (FCOJ and SSOJ) will reach a 4-year high of 280.9 million SSE gallons by season's end in 2025/26. This estimate includes 44-percent and 34-percent increases in FCOJ and SSOJ stocks, respectively.

U.S. grapefruit production increased in 2025/26: While U.S. grapefruit production has dropped over time, 2025/26 saw a modest year-over-year increase. Domestic production reached 317,000 tons, up 3 percent from the revised 2024/25 estimate. Fresh grapefruit prices were \$27.19 per box in 2025/26, down 2 percent from 2024/25, reflecting increased domestic availability. California remained the leading grapefruit producer at 176,000 tons—about half of total U.S. output—supported by strong yields averaging 444 boxes per acre, slightly above its 5-year average. California is also the only State to expand bearing acreage, adding 1,000 acres for a total of 9,900 in 2026. Texas, where grapefruit is the primary citrus crop, continues its long downward trend in production. Bearing acreage remained 7,600 acres, and yields improved to 276 boxes per acre—a 5-percent increase from last season and 19 percent above the State’s 5-year average. Florida’s grapefruit crop climbed to 57,000 tons in 2025/26, a 3.8-percent increase from last year’s historic low. This increase was driven by improved yields, which offset an 18-percent drop in bearing acreage.

Most U.S. grapefruit production continues to move to the fresh market; roughly 40 percent goes to processing. Grapefruit juice production in 2025/26 is forecast to be 10.89 million SSE gallons, the lowest level in at least 56 years. Grapefruit juice imports, which have trended upward since the late 1990s, are forecast at 4.77 million SSE gallons in 2025/26 (October–September), down 15 percent from last season. Mexico will remain the top supplier, followed by South Africa and Spain. Despite higher domestic production, U.S. grapefruit juice exports are down 16 percent year to date (October–July). Canada, South Korea, the United Kingdom, and Mexico will continue to take the bulk of U.S. grapefruit exports, accounting for roughly 85 percent of total shipments.

Lemon production slips in 2025/26 but remains above 5-year average: The 2025/26 U.S. lemon crop totaled 1.1 million tons, down about 2 percent from 2024/25, a modest decline given last season’s bumper crop. Nonetheless, production remained 7 percent above the 5-year average. In California, 2025/26 bearing acreage climbed to the highest level since the 1982/83 season. California lemon production in 2025/26 accounted for 94 percent of the U.S. crop, while Florida and Arizona together accounted for the remaining 6 percent share. About 23 percent of the U.S. lemon crop in 2025/26 was destined for juice, including virtually all of Florida’s production.

U.S. fresh lemon imports in 2025/26 (August 2025–July 2026) totaled 371 million pounds, similar to last year. U.S. lemon imports from Chile and Mexico rose in 2025/26, while imports from Argentina declined slightly due to lower domestic production. U.S. fresh lemon exports in 2025/26, on the other hand, increased 15 percent from last season to 196.8 million pounds amid

tighter global supplies. U.S. fresh lemon exports to Canada, Japan, and Mexico increased substantively, while exports to South Korea fell—these four markets accounted for more than 90 percent of U.S. fresh lemon exports.

Tangerine production reached new highs in 2025/26: The commodity group—tangerines, mandarins, clementines, minneolas, tangelos, and related varieties—remains overwhelmingly concentrated in California, which accounted for 97 percent of production in 2025/26. California's 2025/26 tangerine crop totaled 1.24 million tons, a 2-percent year-over-year increase—driven by a 1,000-acre increase in bearing acreage, offsetting a 1-percent decline in yield. Florida's crop totaled 22,000 tons, up 15 percent from 2024/25—as higher yields (up 45 percent) more than offset a 1,000-acre decrease in bearing acreage (down 20 percent). About 65 percent of Florida tangerines in 2025/26 went to the fresh market.

Outlook for 2026/27 U.S. citrus season: NASS has not yet released a 2026/27 forecast for all-citrus production in the United States. However, if the 2026/27 all-citrus forecasts follow the previous season's original forecasting cycle, estimates will be released quarterly in October, January, April, and July. On September 11, 2026, NASS and the California Department of Food and Agriculture (CDFA) released 2026/27 production forecasts for California Navel oranges and California mandarins. According to the *California Navel Orange Objective Measurement Report*, 2026/27 California Navel orange production is forecast to be 84 million 40-pound cartons, up 5 percent from 2025/26. The *California Mandarin Objective Measurement Report* forecasts that 38 million 40-pound cartons of Tango and W. Murcott Afourer Mandarins will be produced in 2026/27, about 15 percent more than last September's 2025/26 forecast.

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