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Fruit and Tree Nuts Outlook: September 2025

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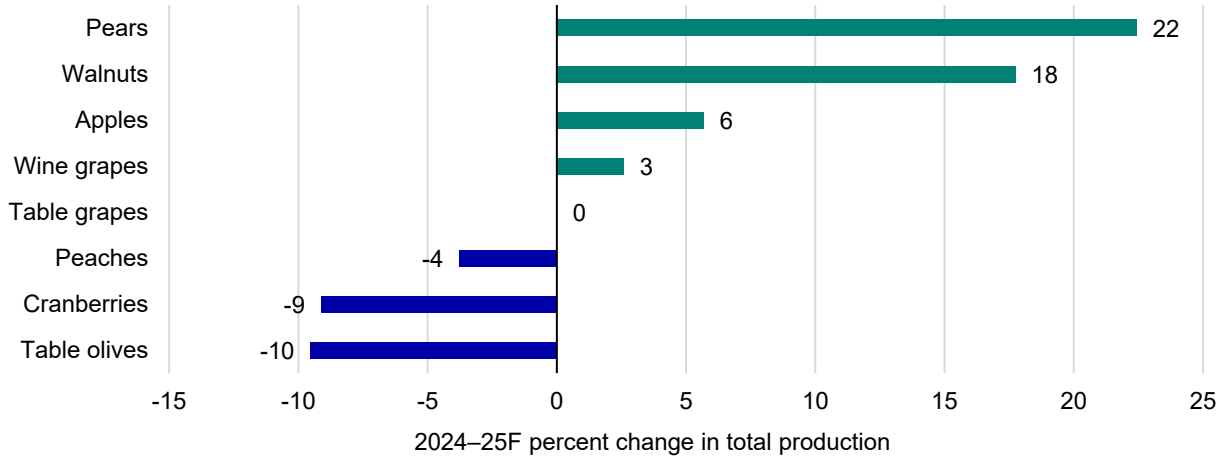
In this report:

Price Outlook
Noncitrus Fruit Outlook
Tree Nuts Outlook
Citrus Fruit Outlook

Fall Production Forecasts in 2025

USDA's National Agricultural Statistics Service (NASS) 2025 production forecast is up for pears, walnuts, apples, and wine grapes but down for peaches, cranberries, and table olives. In 2025, California's table grape production is expected to be unchanged from last year. Pear production in 2025 is forecast 22 percent higher, as orchards in the Pacific Northwest rebound from a previous crop damaged by cold winter weather. The 2025 U.S. apple crop forecast is 6 percent larger year over year, with top producing State Washington expected to produce a record high 8 billion pounds. A smaller peach crop is expected this year, with reduced production in California and the Southeast. California walnut production is forecast 18 percent higher in 2025, following a 2024 season that was negatively impacted by a warm winter followed by extreme summer heat.

Year-to-year production changes for selected fruit and tree nuts, 2024–25F



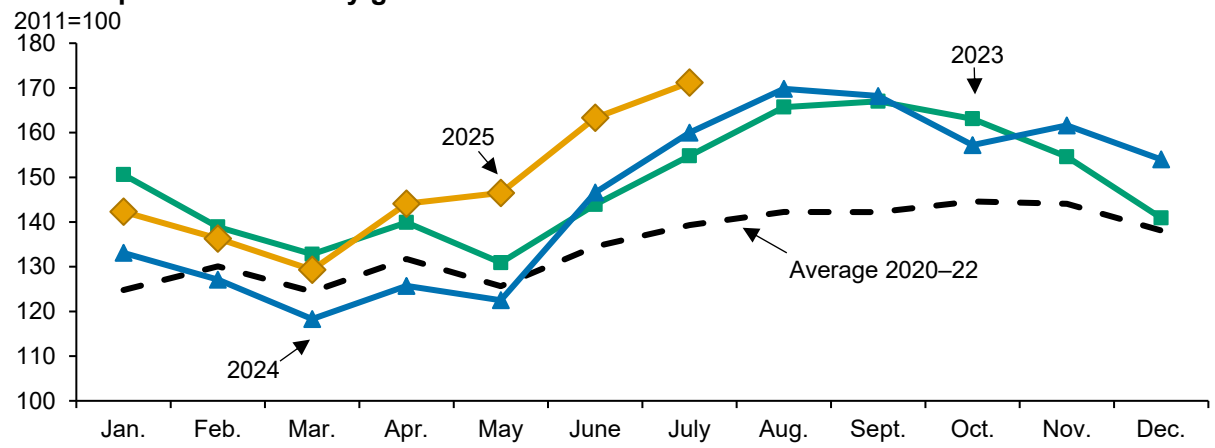
F = Forecast.
Note: Table grape forecast represents California table grape production. Wine grape forecast includes California and Washington.
Source: USDA, Economic Research Service based on data from the USDA, National Agricultural Statistics Service, *Crop Production* (August and September 2025 issues) and *2025 California Table Olive Probability Survey Report.*

Price Outlook

Fruit and Tree Nut Grower Prices Are Up in 2025

In July 2025, the index of prices received by growers for fruit and tree nuts was 171 (2011=100), about 7 percent higher than July 2024 and 11 percent higher than July 2023 (figure 1). As in prior years, prices received by growers in 2025 increased in the late spring and early summer (April through July). This trend partially stems from seasonal production of fruit and tree nuts. Grower prices for peaches, pears, and lemons were higher in mid-2025 than they had been in mid-2024.

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.*

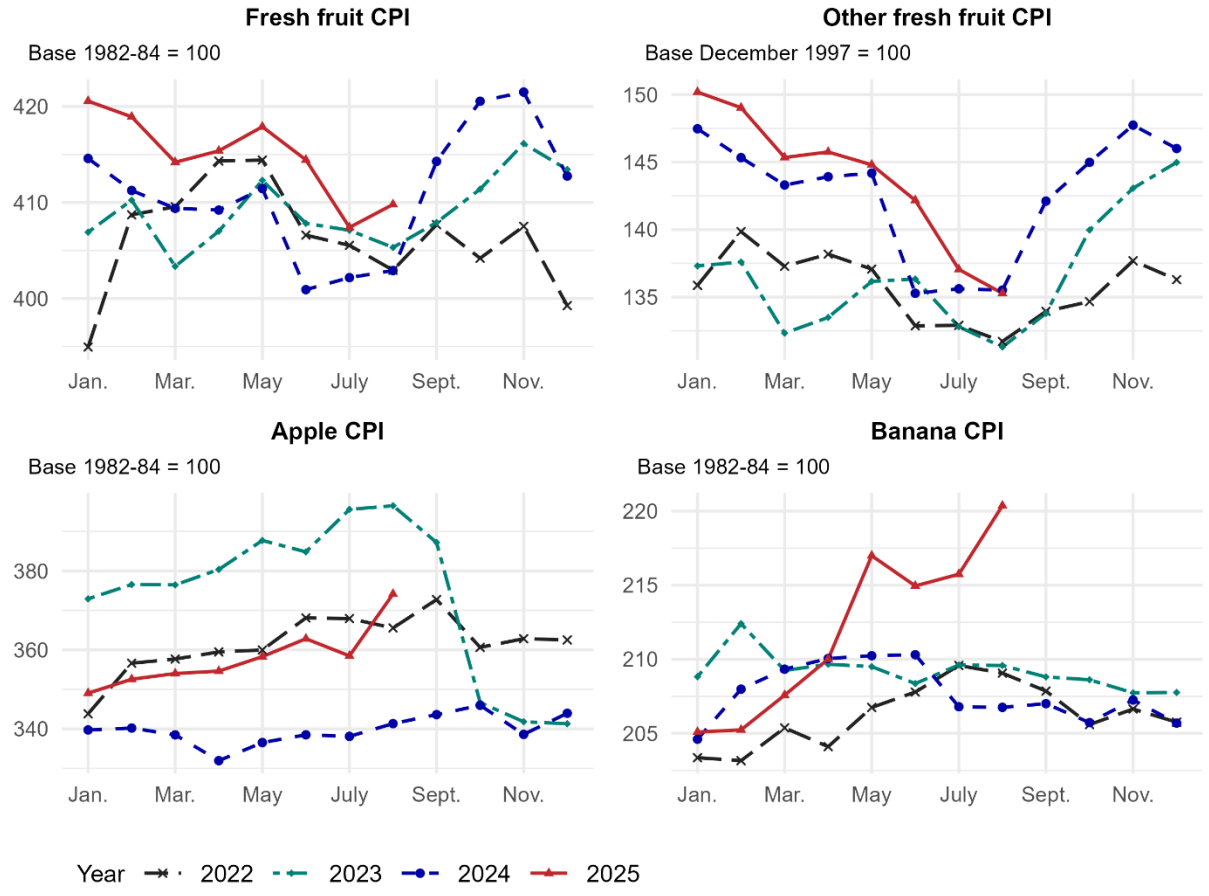
Consumer Price Index for Fresh Fruit in 2025: The Consumer Price Index (CPI) for fresh fruit was reported at 409.8 (1982–84=100) in August 2025, up 2 percent from the same time last year according to data from the U.S. Department of Labor, Bureau of Labor Statistics (figure 2). Apple and banana prices are two of the most heavily weighted components in the fresh fruit CPI, accounting for 14 percent and 19 percent, respectively, and together accounting for more than 3 times the weight of the citrus fruit CPI (11 percent). The “other fresh fruit CPI” accounts for the remainder of the relative weight of the fresh fruit CPI (55 percent). In August 2025, the apple, banana, and citrus CPIs were higher compared with August 2024, but the other fresh fruit CPI was unchanged from a year ago.

Banana retail prices on the rise in 2025: Retail prices for bananas have largely defied inflationary pressures since the turn of the century. Prices have remained fairly flat, apart from notable upticks during economic disruptions, such as the Great Recession of 2008 and the Coronavirus (COVID-19) global pandemic. Average national-level retail banana prices averaged $0.50 per pound throughout most of the 2000s, before spiking above $0.60 per pound during

the 2008 recession and maintaining this level through the early 2010s. Banana retail prices spiked again in 2021 during the COVID-19 pandemic, surpassing $0.60 per pound and ranging from $0.61 per pound to $0.64 per pound.

Retail prices for bananas rose month over month from February to May 2025, before reaching a high of $0.67 per pound in August. August 2025 banana prices were 9 percent higher than August 2024, the largest year-over-year increase since the COVID-19 pandemic. Banana supplies in the United States have been lower year to date in 2025, helping to put upward pressure on prices. Imports of fresh bananas were 3 percent lower from January to July 2025, compared to the same period a year before. Volumes from top supplier, Guatemala, were down 5 percent in the first 7 months of 2025, and imports from other major suppliers, Costa Rica and Honduras, were 21 percent lower. La Niña weather patterns and banana fungal diseases have negatively impacted banana supplies from Central America.

Figure 2
U.S. monthly fresh fruit consumer price indexes, 2022–25



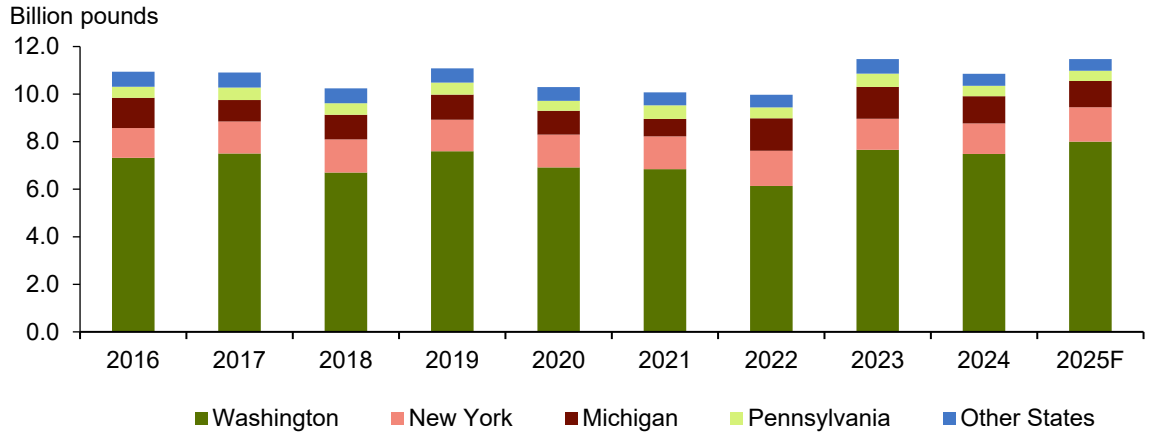
CPI = Consumer Price Index.
Source: USDA, Economic Research Service based on data from U.S. Department of Labor, Bureau of Labor Statistics.

Noncitrus Fruit Outlook

U.S. Apple Crop Forecast Is Up in 2025

The 2025 U.S. apple crop is forecast at 11.5 billion pounds according to the August USDA, NASS *Crop Production* report. The 2025 apple crop marks the third season in the last decade that annual production exceeded 11 billion pounds, based on 7 NASS-surveyed States (figure 3). If realized, the 2025 apple forecast would be 6 percent larger than 2024 but similar to production volume in 2023.

Figure 3
2025 U.S. apple production is up based on seven Surveyed States



F = Forecast.
Note: Total production is based on seven NASS-surveyed States. Other States include Virginia, California, and Oregon.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service.

In **Washington**, the largest apple producing State, the crop is forecast to be 8 billion pounds, 7 percent higher (520 million pounds) than last year. If realized, the 2025 apple crop would be the largest in Washington history. In August 2025, the Washington State Tree Fruit Association described fruit quality as high this season but noted labor challenges may lead to more selective harvest decisions and reduce final harvested volume. On average, about 80 percent of Washington apples go to the fresh market. This fresh market share is higher than the next 3 apple producing States (New York, Michigan, and Pennsylvania), which each had an average fresh market share closer to 50 percent over the last 5 seasons. In marketing year (MY) 2025/26 (August–July), the top 3 apple varieties in Washington (Gala, Honeycrisp, and Granny Smith) are expected to account for 48 percent of volume according to U.S. Apple Association's (USApple) *Industry Outlook 2025* report.

In **New York**, 2025 apple production is forecast to increase 12 percent year over year, ranking second in apple production behind Washington, with 1.45 billion pounds. If realized, New York's 2025 apple crop will be the largest since 2022. By early September, USDA, NASS crop

conditions were rated 23 percent good to excellent, well below last season for that week (82 percent) and below the 5-year average (58 percent). Hot and dry growing conditions across the State began to subside as apple harvest began, according to Cornell Cooperative Extension. Apple harvest in New York was trending ahead of the 5-year average during September and is expected to be largely complete by the end of October. In MY 2025/26, the top 3 apple varieties in New York (McIntosh, Gala, and Rome) are expected to account for 31 percent of volume, USApple reported.

The 2025 USDA, NASS apple production forecast in **Michigan** is 1.1 billion pounds, 4 percent lower than last season and 19 percent smaller than the 1.36 billion record-sized production in 2022. Out of the seven NASS-surveyed States, Michigan has ranked first or second in apple yield in three of the last five seasons, which is partly attributable to an increase in acreage with high-density planting varieties. In MY 2025/26, USApple expects Michigan's top 3 varieties (Gala, Fuji, and Red Delicious) to account for 41 percent of total volume.

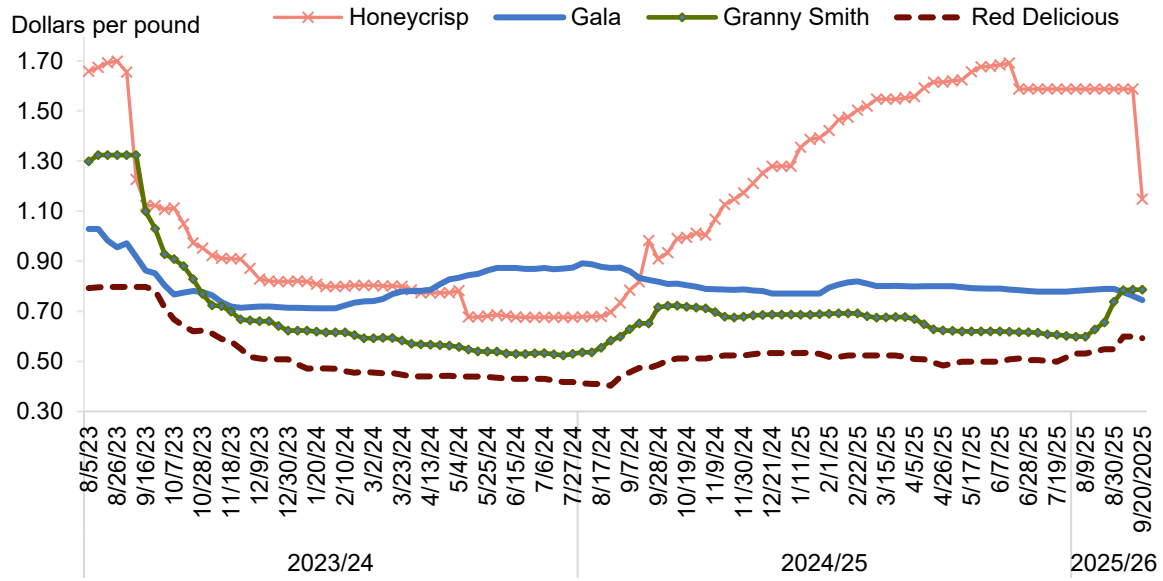
Pennsylvania is forecast to produce 430 million pounds of apples in 2025, which represents 4 percent of U.S. production. This year's forecast is 1 million pounds smaller (down 0.2 percent) compared to the 2024 crop, and overall quality is reported as high. At the end of August 2025, apple crop conditions in Pennsylvania were rated 81 percent good to excellent, above the 5-year average (75 percent). For the week ending September 21, 2025, Pennsylvania apple harvest was 90 percent complete and well ahead of the 5-year average (60 percent). In MY 2025/26, the top 3 apple varieties in Pennsylvania (York, Golden Delicious, and Fuji) are expected to account for 57 percent of total volume, according to USApple.

Virginia and **Oregon** are each forecast to produce 165 million pounds of apples this year. In Virginia, a spring freeze damaged apple blossoms, contributing to an expected 28-percent year-over-year decline in production. The 2025 apple crop in Oregon is up 38 percent year over year and the largest since 2020. **California**, the smallest apple-producing State of the 7 NASS surveyed States, is expected to produce 160 million pounds. These three States combined are forecast to account for 4 percent of U.S. commercial apple production in 2025.

Heading into 2025/26 harvest and homing in on Honeycrisp: Late summer marks the transition period between the end-of-season apple storage crop and new crop apple harvest, which starts in August and continues through October. On June 1, 2025, 2024/25 fresh apple holdings were 2 percent lower than the same time a year ago but about 35 percent higher than the previous 5-year average, according to USApple. Apple storage volumes of Honeycrisp in June 2025 were 47 percent lower than a year ago, reflecting a smaller 2024/25 Honeycrisp

crop, following a record size crop in 2023/24. In 2025/26, USApple expects the production volume of Honeycrisp variety, which is known for its alternate bearing nature, to exceed 2023/24 volumes. If realized, Honeycrisp will rank third in apple varieties by volume for the first time, surpassing Granny Smith but continuing to trail Gala and Red Delicious. Honeycrisp is a top five apple variety in the major apple-producing States of Washington and Michigan. If prices in 2025/26 follow a similar pattern to 2023/24, the larger Honeycrisp volume may put further downward pressure on Honeycrisp prices throughout fall harvest and the storage season, leading to lower price premiums compared to 2024/25 (figure 4).

Figure 4
FOB prices for top apple varieties, August 2023–mid-September 2025



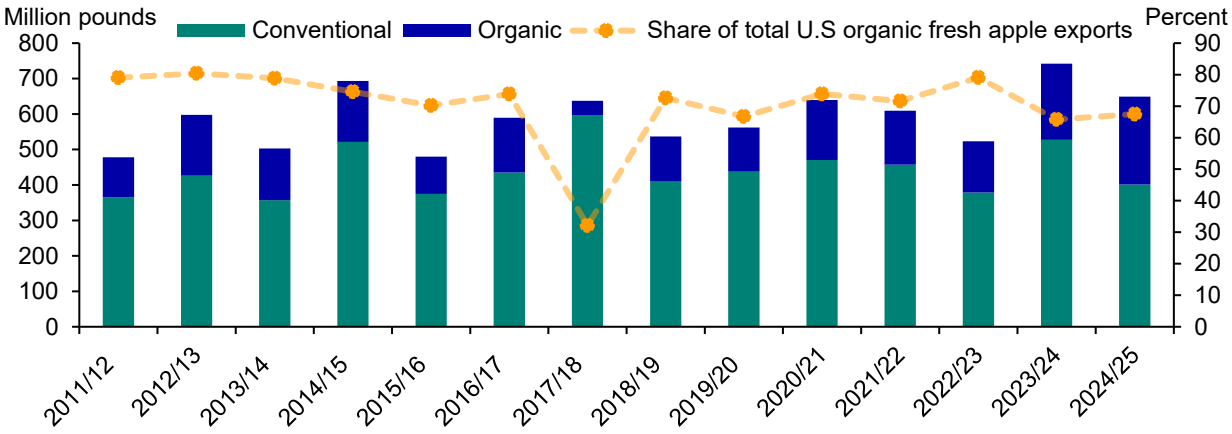
FOB = Free-on-board.
Note: Apple marketing year begins in August and ends in July of the following year. Domestic conventional apples, in 40-pound carton tray packs, item sizes 64-88, extra fancy. Includes prices from Washington, New York, and Michigan.
Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service, *Market News*, shipping-point prices.

Fresh apple exports are higher, imports are lower in the last two seasons: In MY 2024/25, the United States exported approximately 25 percent of its fresh market apple production volume, the same share as last season. U.S. fresh apple exports in MY 2024/25 totaled 1.85 billion pounds by volume and $1 billion by value. In 2024/25, the fresh apple export volume was 129 million pounds lower (7 percent) than 2023/24 but 19 percent higher than the previous 3-year average (2020/21–2022/23). However, the total value of fresh apple exports in 2024/25 decreased by a smaller percentage (down 3 percent), reflecting higher export unit values compared to last season (up 4 percent). Among the top 5 destinations for U.S. fresh apple exports, the value of a pound of exported apples was the lowest in India (44 cents per pound) and the highest in Vietnam and Taiwan (63 cents and 61 cents per pound, respectively). According to export shipment data collected by the Washington State Department of Agriculture,

about 70 percent of Washington apple export volume to India consisted of the lower priced Red Delicious variety. In contrast, Gala and Cosmic Crisp varieties each accounted for about 20 percent of export shipments to Vietnam in 2024/25, while Fuji was the top variety by volume to Taiwan, with more than 70 percent of the volume.

U.S. organic fresh apple export volume was a record high in 2024/25: U.S. fresh organic apple exports increased from 326.7 million pounds in 2023/24 to 368 million pounds in 2024/25. Organic apples represented 20 percent of total fresh export value and volume in 2024/25. Mexico was the top destination for fresh conventional apples (27 percent of volume) and organic apples (67 percent of volume) during MY 2024/25 (figure 5). Canada has historically ranked second in organic exports—but for the second season in a row, India was the second destination, representing 7 percent of volume (24.5 million pounds)—with Canada ranking third (20.6 million pounds). Year over year, organic apple exports fell 18 percent to India but were unchanged to Canada.

Figure 5
U.S. organic fresh apple export volume to Mexico record high in 2024/25



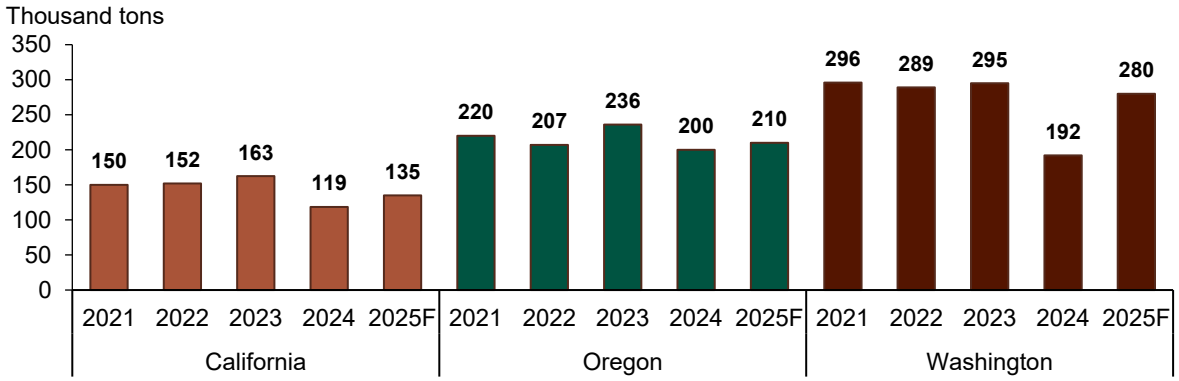
Note. Apple marketing year starts in August and ends in July of the following year.
Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census.

Bigger 2025 Pear Crop Is Still a Historic Low

The USDA, NASS 2025 pear forecast is 625,000 tons, up 22 percent from last year's historically small crop but 7 percent below the previous 3-year average (2021–23). In 2024, U.S. pear production was the lowest since 1967, due in part to adverse weather conditions that led to production declines in all three NASS-surveyed States (California, Oregon, and Washington) (figure 6). In 2025, pear yields are expected higher, but if the forecast is realized, this season would still mark the second lowest U.S. pear volume on record since 1972. Besides last season's weather-related production decline, lower pear production in 2024 and 2025 reflects a long-term decline in U.S. pears for processing (mostly canned).

Figure 6

2025 pear production forecast is up in top three States



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

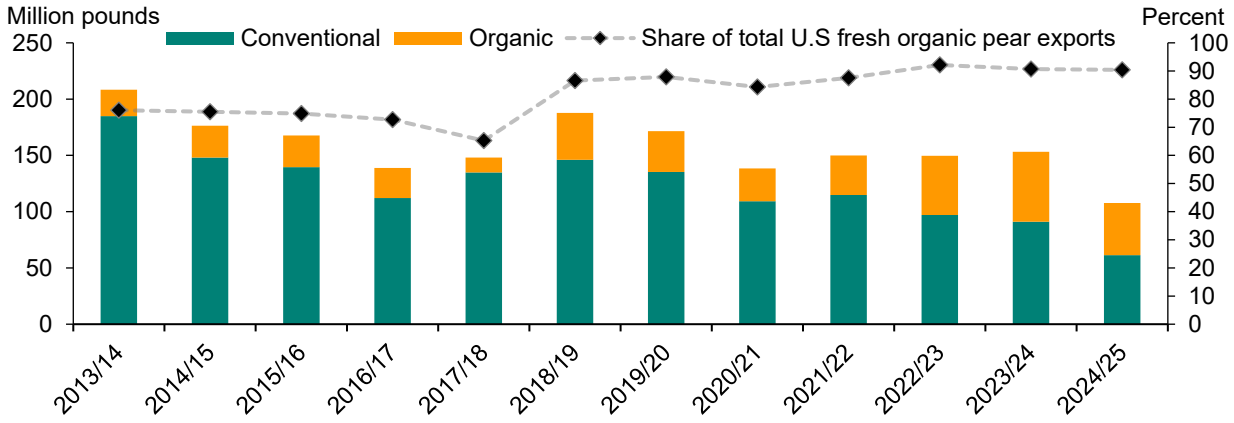
Washington, typically the largest pear-producing State, is forecast to produce 280,000 tons this season, accounting for 45 percent of the U.S. crop. The 2025 forecast in Washington is 46 percent higher than last year's short pear crop but 5 percent below the previous 3-year average (2021–23). Favorable growing conditions through the spring and summer have contributed to higher pear yields. In the most recent *Washington Tree Fruit Acreage Report* (2017), Bartlett and D'Anjou pear varieties each account for about 40 percent of pear bearing acres. Bartlett pears are harvested in August and early September, with fresh-market shipments generally winding down by February. D'Anjou pears are harvested later in the fall, and due to their longer storage life, are available for fresh market consumption into the following summer months.

In 2025, the pear production forecast in **Oregon** is 210,000 tons, accounting for 34 percent of U.S. production. If this forecast is realized, it would be a 5-percent increase from 2024 but 5 percent below the previous 3-year average (2021–23). The 2025 pear production forecast for **California** is also up from last season. California pear growers are expected to produce 135,000 tons in 2025, a 14-percent increase from last season but 13 percent below the previous 3-year average (2021–23). In contrast to Washington and Oregon pears, which are grown primarily for the fresh market, more than half of California's pear crops are processed (primarily as canned pears or in fruit cocktail). Most processed pears in California have historically been, and continue to be, the Bartlett variety.

Fresh pear export volume falls to a multidecade low in 2024/25: During MY 2024/25 (July–June), fresh pear export volume totaled 159 million pounds. This number was 35 percent lower than the previous season, the lowest export volume since 1988/89, and the first marketing year the United States was a net importer of fresh pears. Exports for fresh conventionally produced pears fell 39 percent by volume and 24 percent by value in 2024/25 compared to 2023/24. Organic fresh pear exports decreased 25 percent by volume and 16 percent by value in

2024/25. At 51.3 million pounds, 2024/25 organic pear volume accounted for one-third of exports. Mexico was the top destination for fresh conventional pears (57 percent of volume) and organic pears (90 percent of volume) during MY 2024/25 (figure 7).

Figure 7
Mexico is top destination for U.S. fresh organic pear exports



Note. Pear marketing year starts in July and ends in June of the following year. Excludes quinces.
Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census.

Grape Production Is Higher in 2025

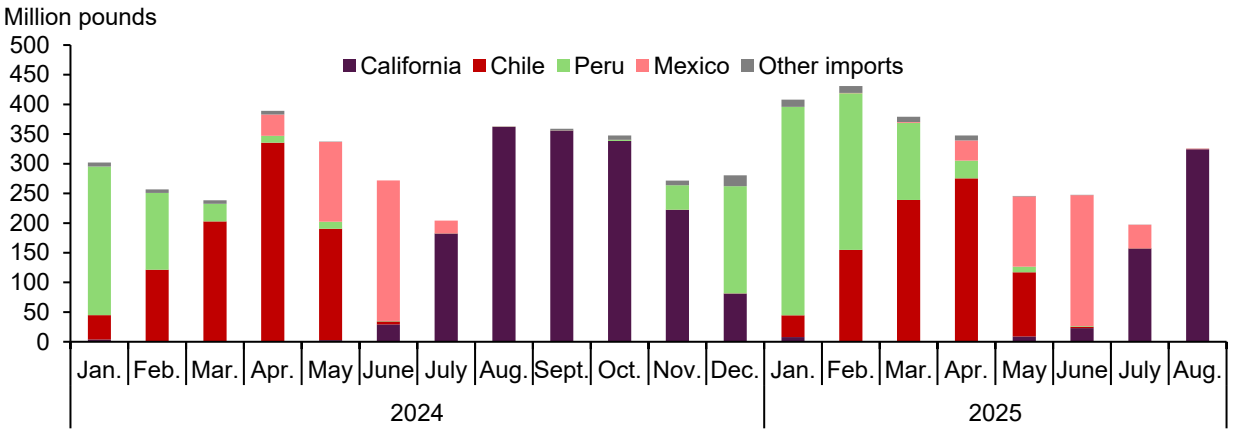
The U.S. grape crop is forecast to be 5.59 million tons in 2025, an increase of 3 percent from the 5.40 million tons produced in 2024 but considerably lower than the 2013 peak of 8.63 million tons (down 35 percent). Domestic grape production in 2024 was the lowest since 1987, as grape production in top grape-producing State, California, has trended downward over the last decade after peaking in 2013 at 7.74 million tons. In 2025, grape production is expected to increase in California, New York, and Oregon and decrease in Washington year over year.

California is the top grape producing State in the United States, accounting for about 90 percent of domestic grape production. California grape production is forecast to be 4.98 million tons in 2025, an increase of 2 percent from 4.88 million tons in 2024. Last year, about 18 percent of California's grape production was destined for the fresh market, with the remaining 82 percent going to processing, largely destined to be crushed and made into wine. In 2025, table grape production in California is forecast to be 980,000 tons, unchanged year over year and below 1 million tons for the third consecutive year since the remnants of Hurricane Hilary disrupted peak table grape harvest in August 2023.

Fresh grape availability reaches record high: Per capita availability of fresh grapes was 9.56 pounds per person in 2024/25 (May–April), an increase of 15 percent year over year and the highest on record. Import volumes reached record highs, exceeding 2 billion pounds and surpassing domestic production for the second year in a row. From August to November,

California is the primary table grape supplier for domestic consumption (figure 8). Grape imports from Peru are available during the winter months, before transitioning to imports from Chile in the spring and Mexico in early summer. Year-to-date shipment volumes from California were lower through mid-September.

Figure 8
Table grape shipments shift seasonally from California to imports



Note: The Other imports category includes shipments from Brazil, Canada, Dominican Republic, Italy, New Zealand, South Africa, South Korea, and Spain.
Source: USDA, Economic Research Service based on data from USDA, Agricultural Marketing Service, *Market News*.

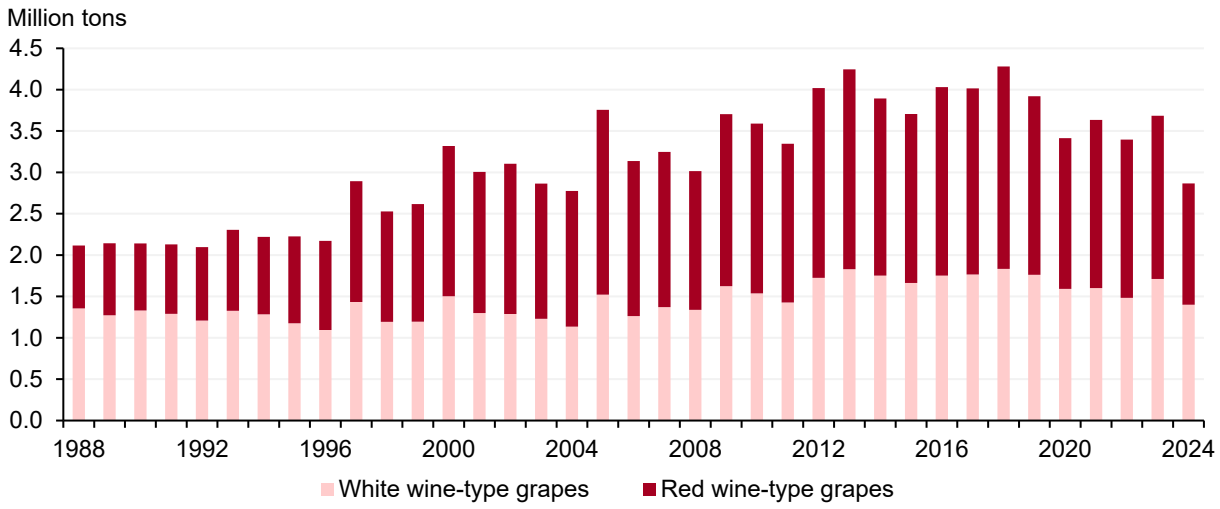
West Coast wine grape production is higher in 2025: USDA, NASS reports wine-type grape production for only two States, California and Washington. In 2025, wine-type grape production for California is forecast to be 3 million tons, an increase of 4 percent from 2024 but 16 percent below the previous 3-year average (2021–23). After producing a record wine grape crop in 2018 (4.29 million tons), wine-type grape acreage in California has declined by 40,000 acres from its peak of 590,000 bearing acres in 2018–19. Washington wine-type production volume in 2025 is expected to be 120,000 tons, 21 percent lower than 2024 and 38 percent below the previous 3-year average (2021–23). The USDA, NASS grape production forecast for Oregon does not specify grape type, but production data from the previous decade indicated all grape production in Oregon was processed as wine. The Oregon grape crop this season is expected higher, from 84,800 tons in 2024 to 110,000 tons in 2025. Combined, the expected increase in California and Oregon wine grape production will more than offset the decline in Washington State in 2025.

Wine Varieties Varied Along the West Coast in 2024

In 2024, wine-type grape production declined year over year in California, Washington, and Oregon, as U.S. demand for wine has fallen over the last decade. Wine per capita availability fell in 2024 to 2.21 gallons per person, a decrease of 11 percent year over year and 30 percent below the peak of 3.13 gallons per person in 2013. Wine imports in 2024 were 18 percent lower than the 2022 peak.

2024 California grape crush is the smallest in almost 30 years: The 2024 California grape crush totaled 2.94 million tons, a decrease of nearly 25 percent from the 2023 crush and dropping below 3 million tons for the first time since 1996. California producers grow more than 100 varieties of wine-type grapes each year, with 51 percent red varieties and 49 percent white varieties. Of the 2.94 million tons crushed in California, wine-type grapes made up 2.87 million tons, the lowest volume since 2004 (figure 9). The top wine-type grape crushed in 2024 was Chardonnay with 527,800 tons, followed by Cabernet Sauvignon with 454,600 tons. These top two varieties accounted for one-third of all wine-type grapes crushed in 2024.

Figure 9
Wine grapes crushed in California were the lowest in two decades in 2024



Source: USDA, Economic Research Service based on data from California Department of Food and Agriculture, *California Grape Crush Report*, various issues.

Washington wine grapes: According to the Washington State Wine Commission's *2024 Grape Production Report*, the Washington wine grape crop totaled 150,800 tons in 2024, a decrease of 5 percent from 159,000 tons in 2023 and 22 percent below the 3-year average. Red varieties accounted for 55 percent of the wine grapes grown in Washington in 2024, with white varieties accounting for the remaining 45 percent. Cabernet Sauvignon continued to be the top variety grown in Washington in 2024, accounting for 27 percent of the State's wine grape production. However, unlike California, Washington wine growers produce more Riesling than Chardonnay, which ranked second and third in terms of volume in 2024 and cumulatively accounted for 29 percent of the State's production.

Oregon wine grapes: According to the University of Oregon's *2024 Oregon Vineyard and Winery Census*, the Oregon wine grape crop was smaller in 2024, decreasing by 1 percent year over year but 2 percent above the 3-year average. Most of Oregon's vineyards are in the Willamette Valley, accounting for 71 percent of the State's planted acreage and 77 percent of production in 2024. The climate of this region of western Oregon is favorable for cooler-season

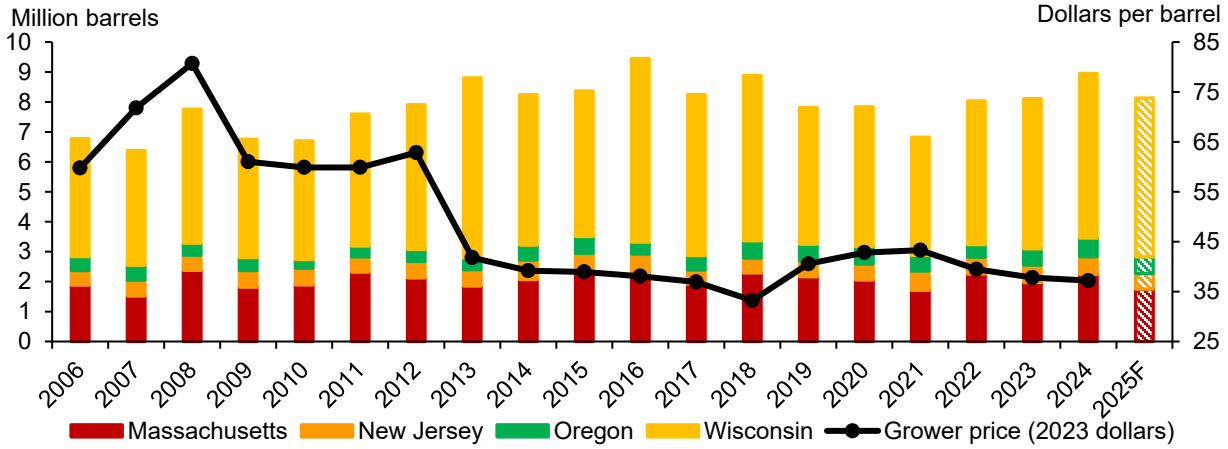
grapes. Unlike California and Washington, the two top wine varieties by crush volume in Oregon in 2024 continued to be Pinot Noir (a red wine variety) and Pinot Gris (a white wine variety). In 2024, Pinot Noir accounted for 58 percent of the State's production and 64 percent of value.

Processed grape availability continues to decline: Processed grapes include canned, dried, and juice products. In 2024/25 (August–July), U.S. per capita availability of processed grapes (excluding wine) on a fresh-weight basis was 7.14 pounds—a decrease of 13 percent year over year. About 60 percent of processed grape availability is dried. Data from the Raisin Administrative Committee indicates that total raisin shipments were 7 percent lower year over year in 2024/25. Natural Seedless varieties accounted for 86 percent of shipment volume, followed by Golden Seedless (6 percent). Unlike many of the Natural Seedless varieties, Golden Seedless grapes are dehydrated and treated with sulfur dioxide after harvest to preserve their golden color.

By the Barrel: Cranberry Production Is Lower in 2025

Based on data from the Food and Agriculture Organization of the United Nations, the United States produces about two-thirds of the world's cranberries (2021–23). The U.S. cranberry crop is forecast to be 8.13 million barrels in 2025, a decrease of 9 percent from the 8.95 million barrels produced in 2024 but similar to production volume in 2023 (figure 10). U.S. Cranberry production is expected to decline this season in all four annually surveyed States: Wisconsin, Massachusetts, Oregon, and New Jersey. Combined production in these 4 States peaked in 2016 at 9.45 million barrels. When adjusted for inflation, grower prices have fallen each year since 2021.

Figure 10
Cranberry production is expected to decline in top four producing States in 2025



F = Forecast.
Note: A barrel weighs 100 pounds. The implicit price deflator has been rescaled such that the base year is 2023.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service and U.S. Bureau of Economic Analysis, gross domestic product implicit price deflator.

Cranberries are harvested in autumn, and fresh cranberries are readily available during the fall holiday season from October to December. Cranberry vines blossom in late June and into July, and berries develop in August. Cranberries require adequate moisture and lots of sun but can be sensitive to extreme heat. Hotter summers and drought can cause heat stress and injury to cranberry vines and flowers, ultimately leading to decreased yields and poor fruit quality.

Wisconsin: Cranberry production in Wisconsin is expected to be 5.3 million barrels in 2025, a decrease of 3 percent from the 5.49 million barrels produced in 2024 but above the previous 3-year average. Wisconsin is the top cranberry producing State, accounting for about 61 percent of the U.S. crop in recent years (2022–24). Major production areas in Wisconsin include Wood, Monroe, Jackson, and Juneau Counties in the central region of the State (where sandy soils with good drainage are conducive to growing cranberries).

Massachusetts: Cranberry production in Massachusetts is expected to be 1.75 million barrels in 2025, a decrease of 22 percent from the 2.25 million barrels produced in 2024 and the lowest volume since 2021. Massachusetts is the second largest U.S. cranberry producing State, accounting for about 26 percent of domestic production in recent years (2022–24). The top cranberry producing county in Massachusetts is Plymouth County, on the eastern coast of the State. Plymouth County experienced some level of abnormal dryness or drought throughout 2025, though conditions eased in June and July during the summer cranberry bloom period. About 35 percent of the crop was rated in excellent condition by the first week of September 2025, lower than the 51 percent rated excellent the same period a year before.

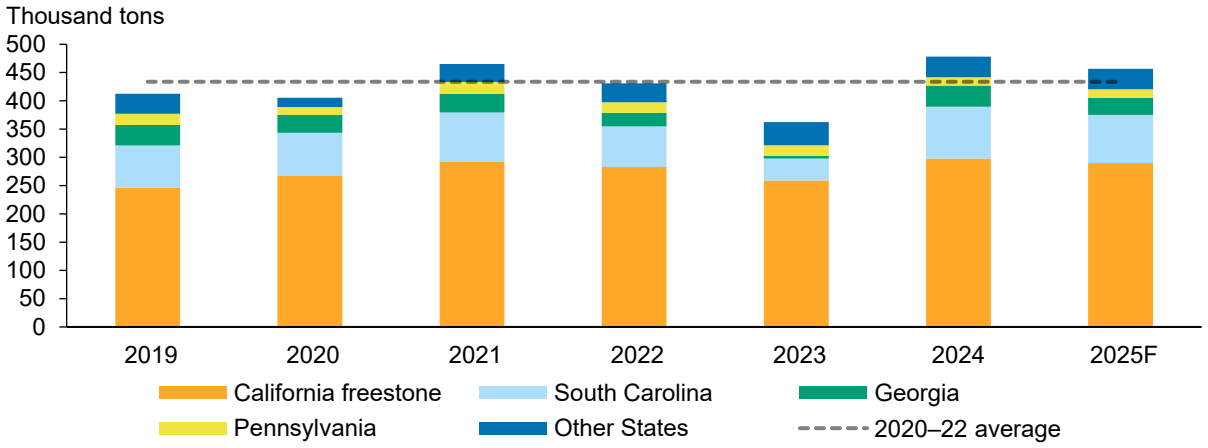
Oregon and New Jersey: Oregon and New Jersey cumulatively make up about 13 percent of U.S. cranberry production in recent years (2022–24). Cranberry production in Oregon is forecast to be 560,000 barrels in 2025, a decrease of 10 percent from a record 623,000 barrels produced in 2024. The top cranberry producing counties in Oregon are Coos and Curry Counties, along the southwestern coast of the State. Both counties have experienced abnormal dryness and drought since June, with conditions worsening through mid-September 2025. Cranberry production in New Jersey is forecast to be 520,000 barrels in 2025, a decrease of 12 percent from the 588,000 barrels produced in 2024. Most New Jersey cranberry farms are in Burlington County, which experienced moderate to extreme drought throughout the first quarter of 2025.

U.S. Fresh Peach Supply Is Lower in 2025

The USDA, NASS August *Crop Production* forecast for U.S. peach production in 2025 is 682,500 tons, a 4-percent decrease from the previous year but 16 percent higher than 2023. In California, the top peach producing State, freestone and clingstone peach production are both forecast to drop from the previous year (by 3 and 0.4 percent, respectively). On average about 70 percent of California freestone peaches enter the fresh market, while clingstone peaches are grown almost exclusively for the processing market. Peach crops in the other NASS-surveyed States are primarily freestone-type, grown for fresh market consumption. When all USDA, NASS-surveyed States are combined with California's freestone crop forecast, estimated freestone production is 4 percent smaller than last year but 5 percent higher than the 2020–22 average (figure 11).

Figure 11

California freestone and six-State peach production is lower in 2025



F = Forecast.
Note: Excludes California clingstones. Other States include Colorado, Michigan, and New Jersey. Washington was not included in the annual survey in 2024 or 2025, and is therefore not included in 2019–23 data.
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 2025).

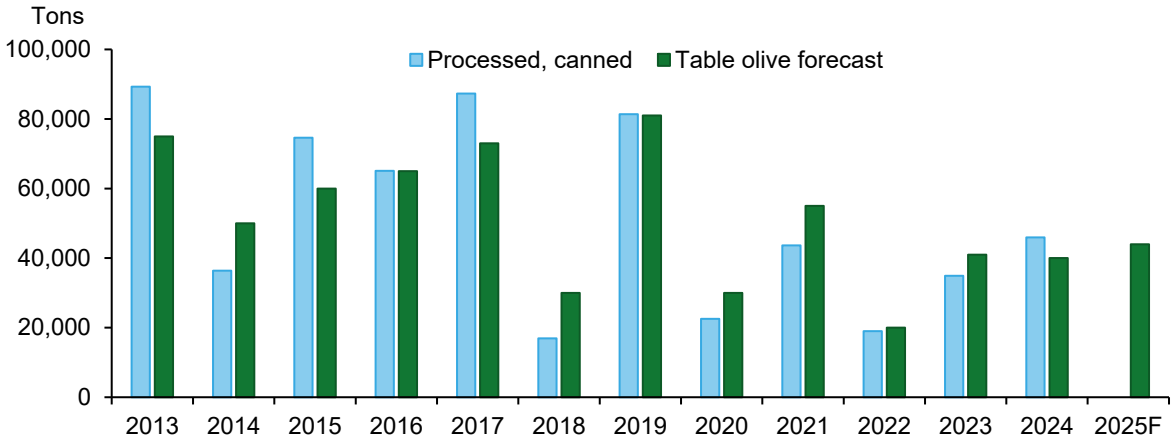
Southeast peach production is lower than last season: In 2025, the peach production forecast in South Carolina is 85,000 tons, down 7 percent from last year. The peach forecast in Georgia is also lower year over year, from 37,200 tons in 2024 to 30,000 tons in 2025. South Carolina and Georgia are ranked second and third in U.S. peach production, respectively, behind California. While peach production in both southeast States is smaller in 2025 compared to last year, production is still much larger compared to the 2023 freeze-damaged crop (up 119 percent in South Carolina and 509 percent in Georgia). In the Southeast, the peach harvest was finished by the end of August. Clemson Agricultural Extension reports indicate this year's South Carolina peach crop was generally in fair condition, with rainy and humid summer weather leading to increased disease pressure.

The small decrease in domestic peach production and higher prices contributed to decreased U.S. fresh peach exports this season. Year-to-date exports (fresh peaches and nectarines) through July 2025 decreased 3 percent by volume, as a 3-percent increase in unit value resulted in total export value being unchanged compared with the same period last year. Canada and Mexico continued to be the top U.S. peach export destinations, accounting for 78 percent of export volume. U.S. organic peach exports year to date were lower compared to last season but continued to account for about 13 percent of volume. About half of all U.S. fresh organic peach and nectarine exports this season went to Mexico.

California 2025 Table Olive Forecast

Most California table olives are processed as canned olives. The 2025 California table olive forecast is 44,000 tons, 10 percent lower than last year's crop of 48,634 tons, according to the USDA, NASS *2025 California Table Olive Probability Survey Report* (figure 12). The Manzanillo olive variety production forecast represents 94 percent (41,500 tons) of total volume, followed by Sevillano (2,400 tons) and other varieties (100 tons).

Figure 12
California olive production processed for canning compared to annual table olive production forecast



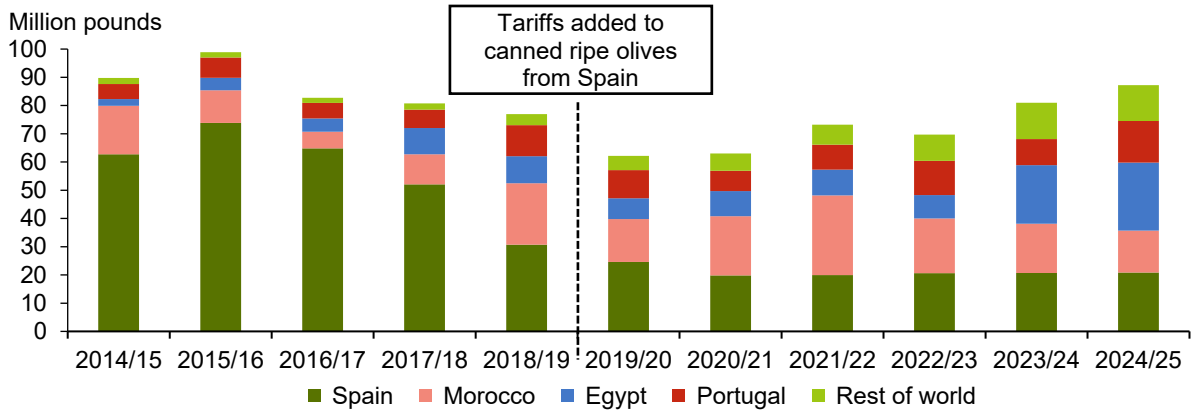
F = Forecast.
Note: Processed canned olive volume includes processed utilized canning and limit size olive production.
Source: USDA, Economic Research Service using data from the USDA, NASS *Noncitrus Fruit and Tree Nuts Annual* and USDA, NASS California table olive reports (various issues).

Bearing acreage for table olives is expected to total 12,000 acres, which represents about 28 percent of all olive bearing acreage in California (43,000 bearing acres in 2024). The remaining acreage is associated with olive oil production. While annual table olive production is variable, lower volumes in recent years are largely attributable to declining table olive-bearing acreage over the last two decades. This decline has been driven by increases in labor costs and import competition, as well as technological advancements that have made harvesting olive oil-type cultivars quicker and less expensive.

The majority of California table olives are destined for canning as “ripe olives,” as opposed to specialty olive styles like Spanish-style green olives or Kalamata olives. In the last decade, canned ripe olives represented about a quarter of all processed olive import volume each year. At the start of the 2019/20 olive marketing year (August–July), the United States issued antidumping and countervailing duty orders on ripe olive imports from Spain (the largest olive-producing country in the world). These tariffs continued to remain in place throughout MY 2024/25.

In the 3 years leading up to the tariffs (MY 2015/16 to 2017/18), Spain accounted for about 75 percent of U.S. canned ripe olive imports (figure 13). In 2024/25, imports from Spain represented 24 percent of canned ripe olive import volume—while Egypt, Morrocco, and Portugal (which are not subject to the same tariffs) accounted for 62 percent. U.S. import volume of canned ripe olives in 2024/25 (87 million pounds) was the highest in 9 years, while all prepared or preserved olive product volume[1] (307 million pounds) was similar to the previous 3-year average. In 2024/25, sliced olives continued to be the most common style of preparation for canned ripe olive imports to the United States, accounting for 86 percent of volume and 83 percent of value.

Figure 13
U.S. canned ripe olive imports fall following countervailing and antidumping tariffs on Spain[1]



[1] Canned ripe olive import codes applicable to countervailing and antidumping tariffs on Spain include: 2005.70.5030, 2005.70.5060, 2005.70.6030, 2005.70.6050, and 2005.70.6060.
Note: U.S. olive marketing year starts in August and ends in July of the following year.
Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census.

[1] Prepared or preserved olive product import volume includes all olive trade codes under the International Harmonized Commodity Coding and Classification System (HS) 6-digit level code 2005.70. Olive oil imports are not included under the HS 6-digit level code 2005.70.

Tree Nuts Outlook

The prices received by domestic nut growers increased during the 2024/25 season. As documented in prior USDA, ERS *Fruit and Tree Nut Outlook* reports, almond, walnut, and hazelnut prices reached their lowest levels in decades during the 2022/23 crop year. Prices rose for almonds, walnuts, and hazelnuts in 2023/24, and that growth continued throughout 2024/25.

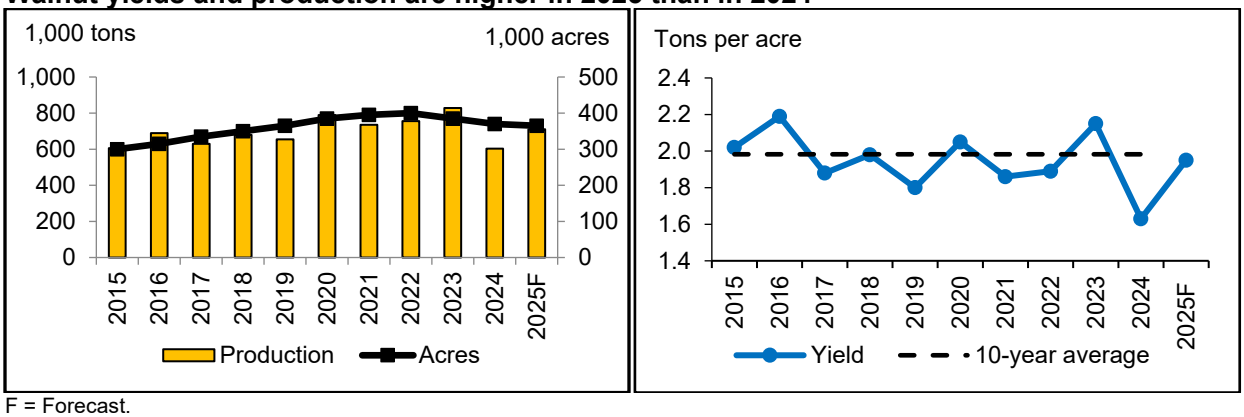
The marketing season for the 2025 crop is beginning with relatively low carry-in expected for almonds and walnuts. Prices during the fall marketing season will depend on many factors, including domestic nut quality, the quality and quantity of nuts produced abroad, trade policy, and export demand.

Walnut Acreage Declines for a Third Consecutive Year, But Yields and Production Are Expected Up In 2025

On average, walnut yields are forecast to increase by 20 percent in 2025, from 1.63 tons per acre in 2024 to 1.95 tons per acre (figure 14). This increase in yields is expected to offset a 1.4-percent decrease in bearing acreage, raising production by 107,000 tons (18 percent), from 603,000 tons in 2024 to 710,000 tons in 2025.

Figure 14

Walnut yields and production are higher in 2025 than in 2024



F = Forecast.
Note: 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*.

USDA, NASS forecasts that walnut bearing acreage will decrease for a third consecutive year in 2025, from 370,000 acres (in 2024) to 365,000 acres (figure 14). In last September's USDA, ERS *Fruit and Tree Nut Outlook* report, ERS reported that it had been 74 years since walnut acreage had fallen in 2 back-to-back years. In fact, California walnut acreage fell every year from 1947 through 1951 (when large domestic inventories, low nut quality, and increases in imports depressed walnut prices). The current 3-year stretch (2023–2025) is only the second

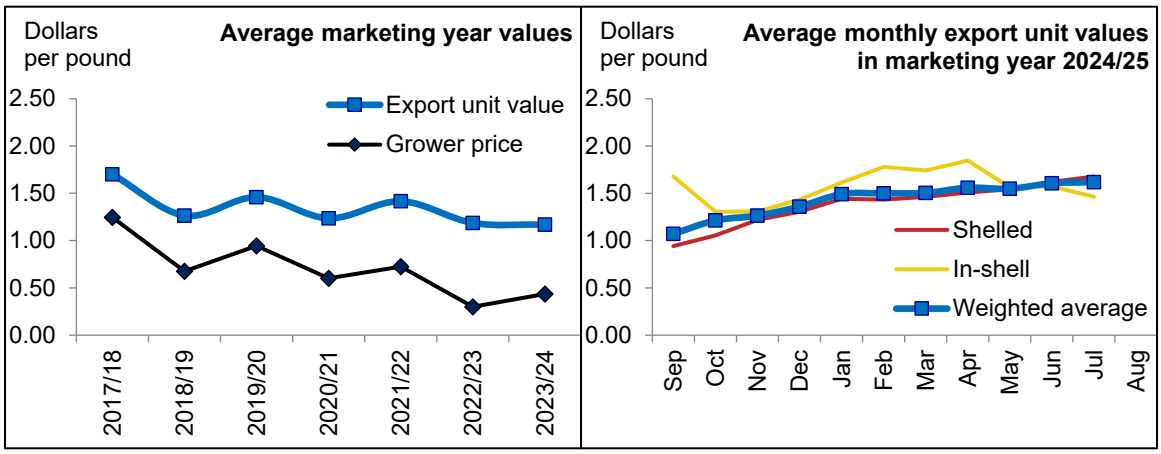
time on record (i.e. since 1920) that walnut-bearing acreage has fallen 3 years in a row. In part, decreases in walnut bearing acreage are due to low walnut prices and high input prices.

Walnut yields depend on the number of trees per acre, the number of nuts per tree, the average weight per nut, and the percent of "sound" (i.e. marketable) nuts per tree. In 2024, the average number of walnuts per tree was 761, 42 percent lower than the 10-year average (1,084 nuts per tree) and the lowest that NASS has published in more than 40 years. In part, the low number of nuts per tree was due to irregular winter and spring temperatures and extreme summer heat. In 2025, the average number of walnuts nuts per tree rose to 972, a 28-percent increase from 2024 levels and similar to the 5-year average (973 nuts per tree).

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. This time of the year is when most of the U.S. walnut crop is harvested and marketed. Data on the average prices domestic producers received for the 2025 crop will not be reported by NASS until the *Noncitrus Fruits and Nuts 2025 Summary* is published in May 2026. However, trade data can provide insights into how global prices have changed recently (figure 15).

Figure 15

The unit value of U.S. walnut exports rose in marketing year 2024/25



Note: Shelled walnut export values have been converted into in-shell equivalents (by multiplying by 0.451). Average prices are weighted by the monthly volume exported.
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.

From September 2024 through July 2025, the weighted average unit value (i.e. value of 1 pound) of U.S. walnut exports was $1.40 per pound on an in-shell basis. This number is considerably higher than the average value of walnut exports in 2023/24 (which was $1.17 per pound). Notably, domestic walnut producers do not receive the full value of export sales (some of which goes to processors, retailers, importers and exporters, and/or packers). On average,

from 2017 through 2024, the value of a pound of exported walnuts was approximately 63 cents higher than the price received by domestic walnut producers.

Recent trade data indicate that China's walnut exports will nearly double during the 2024/25 marketing year and that China will surpass the United States to become the world's largest walnut exporter. However, China's walnut producers tend to ship walnuts to different markets than U.S. producers do (because China does not produce large volumes of light, relatively less bitter walnut varieties such as Chandler and Hartley). U.S. walnut exports are expected to decrease by approximately 20 percent during the 2024/25 marketing year, primarily due to decreases in U.S. walnut production, which fell to the lowest level in a decade in 2024/25 (603,000 tons), a 27-percent decrease from the record high reached in 2023/24 (828,000 tons). Typically, reductions in supply lead to decreases in export volumes and increases in export unit values. From September 2024 through July 2025, U.S. walnut export unit values increased by more than 50 percent.

Almond Per Capita Availability Falls in 2024/25

The 2024/25 marketing year for almonds started in August 2024 and ended in July 2025. The U.S. exported 2.01 billion pounds of almonds (on a shelled basis) in 2024/25—a 1.1-percent increase from 2023/24 and the second highest volume of exports on record. The Almond Board of California reported that carryout for the 2024/25 season was approximately 484 million pounds (on a shelled basis). This number is slightly less than the carryout out in MY 2023/24 (502 million pounds) and approximately 24 percent lower than average carryout from 2019/20 through 2023/24, which was approximately 640 million pounds. Although almond production is expected to increase by approximately 9 percent from 2024/25 to 2025/26, having a smaller volume of inventory on hand will somewhat offset the increase in production. For more information on the 2025/26 almond production forecast, see the *Fruit and Tree Nuts Outlook: July 2025*.

Given current estimates of trade, production, and carryout, ERS estimates that approximately 2.01 pounds of almonds were available to each domestic consumer in 2024/25 (per capita availability is a proxy of domestic consumption). This number is approximately 6 percent less than per capita availability in 2023/24, and the lowest per capita availability has been since 2015/16. Generally, decreases in per capita availability have more to do with tight supplies in 2024 (due to low carry-in and strong export demand) than decreases in domestic demand for almonds. ERS expects domestic almond availability to increase during the 2025/26 marketing year, following a large almond harvest this fall.

Another Record Hazelnut Crop Is Expected in 2025

Most of commercial hazelnut production in the United States occurs in Oregon. Data from the 2022 Census of Agriculture indicate that the Beaver State accounted for more than 95 percent of U.S. hazelnut bearing area. Major producing counties in Oregon include Marion, Yamhill, Linn, Benton, Washington, and Clackamas Counties, which are located in the northwestern quadrant of the State in the Willamette Valley area. This region has a mild climate and rich soil, which is conducive to the production of hazelnuts and other specialty crops (such as tree fruits, berries, and wine grapes).

Record hazelnut production and acreage in 2024: U.S. hazelnut production and bearing acreage have increased rapidly over the last decade. From 1980 to 2012, hazelnut acreage in Oregon ranged between 20,000 and 29,000 acres, reaching 30,000 acres for the first time in 2013. Since then, more than 50,000 acres have been added in the State. Hazelnut acreage reached a record high of 88,000 acres in 2024, an increase of 16 percent year over year. This additional hazelnut acreage helped to more than offset an 11-percent decline in yields in 2024. Oregon hazelnut production reached a record 96,800 tons on an in-shell basis in 2024, an increase of 3 percent from the previous record of 94,200 tons in 2023.

Record hazelnut export volume in 2024: According to data from the Food and Agriculture Organization of the United Nations, as of 2023, the United States was the third largest hazelnut producer globally (behind Turkey and Italy). Turkey accounted for about 60 percent of global production in recent years, while the United States accounted for about 7 percent. In April 2025, severe frosts across Turkey resulted in widespread crop damage for hazelnuts and walnuts—as well as other specialty crop commodities like grapes, apples, cherries, apricots, and peaches. Decreases in Turkey's production are likely to increase demand for U.S. hazelnut exports, putting upward pressure on prices.

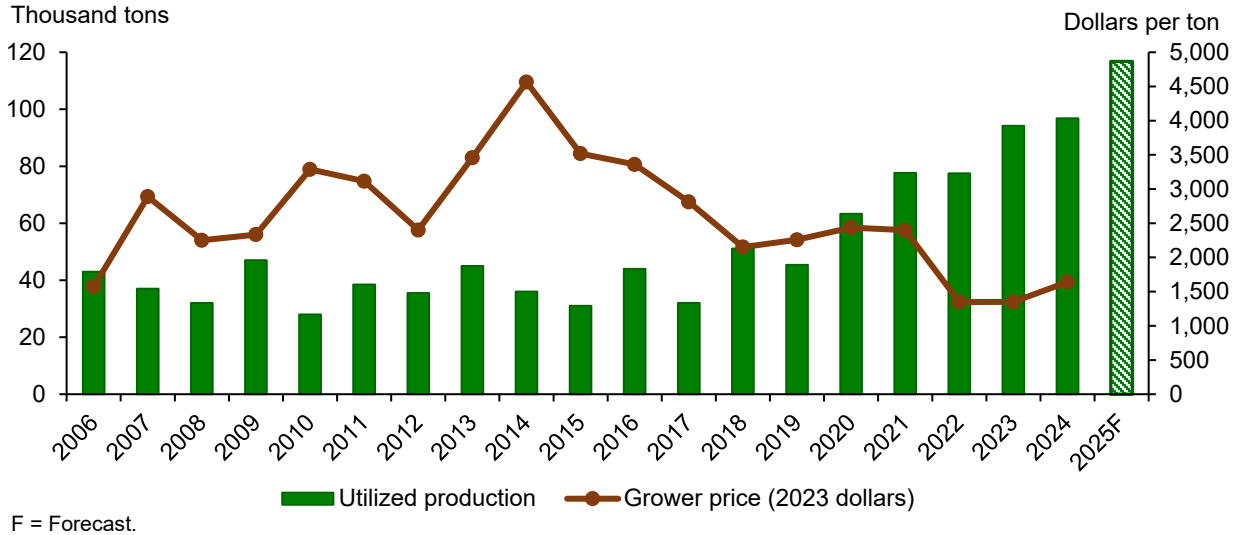
The United States has been a net exporter of hazelnuts each year since the 2003/04 marketing year. On a shelled basis, the United States exported a record 54.0 million pounds of hazelnuts in 2024/25 (July–June), a 20-percent increase year over year from the 45.1 million pounds exported in 2023/24. The United States leads the world in in-shell hazelnut exports and ranks fourth in shelled hazelnut exports behind Turkey, Chile, and Azerbaijan.

Growth in U.S. hazelnut exports has been in shelled products, with volumes more than quintupling from 2020/21 to 2024/25. U.S. export volume (shelled basis) during these marketing years averaged 50 percent of total domestic supply, similar to pistachios (50 percent) but a

slightly lower share compared to almonds (60 percent) and walnuts (60 percent) during the same period.

U.S. hazelnut production in 2025 is expected to surpass 2024 record crop: The 2025 Oregon hazelnut harvest began in September and will extend into October. USDA, NASS will release its 2025 hazelnut production estimate in the *Noncitrus Fruits and Nuts 2025 Summary* in May 2026. Based on preliminary data as of August 2025 from the Hazelnut Marketing Board's *Subjective Yield Survey*, the 2025 hazelnut crop is forecast to increase about 20 percent from 2024 (figure 16). Production is expected to increase on higher yields and acreage. If realized, this season would be another record crop for Oregon hazelnuts, surpassing the 2024 record of 96,800 tons on an in-shell basis.

Figure 16
Oregon hazelnuts expected to reach record high production in 2025



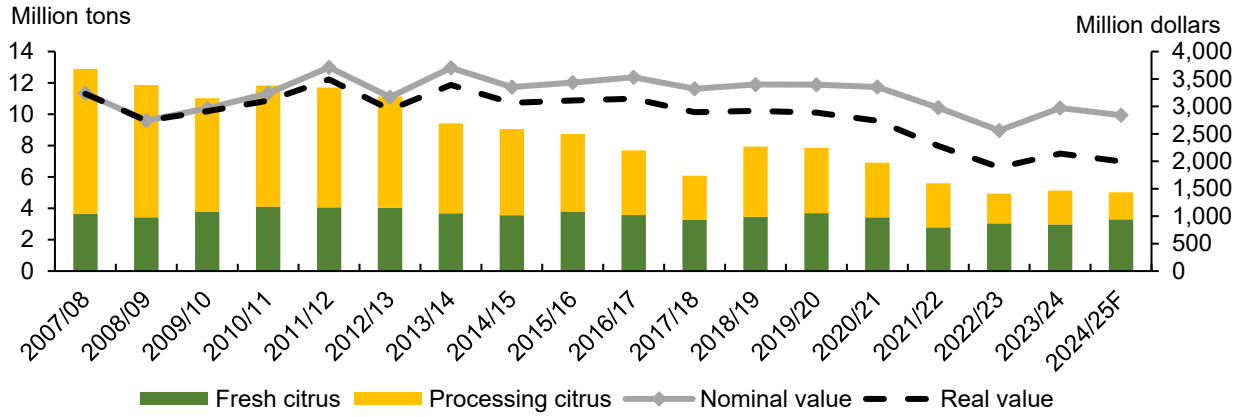
F = Forecast.
Note: The implicit price deflator has been rescaled such that the base year is 2023. The 2025 production forecast assumes year-over-year increases in bearing acreage and yield.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, U.S. Bureau of Economic Analysis, gross domestic product implicit price deflator, and the Hazelnut Marketing Board.

Citrus Fruit Outlook

U.S. Citrus Production Is Down in 2024/25

The final NASS citrus production estimates for the 2024/25 crop year were published on August 29, 2025. Total domestic production of oranges, grapefruit, lemons, and tangerines reached 5 million tons, with about a third (34 percent) going to processing (figure 17). This total is a 2-percent decrease in production levels from 2023/24, and the second smallest combined crop in 84 years. Total production value reached an estimated $2.84 billion. Real production value (adjusted for inflation) is about 7 percent below last season (2023/24) but is about 5 percent above the historic low observed in 2022/23.

Figure 17
Total U.S. citrus production in 2024/25 reaches 5.0 million tons, valued at $2.84 billion



F = Forecast.
Note: Real citrus production value is inflation adjusted using Consumer Price Index with 2009 as base year. CPI data source is Federal Reserve Bank of St. Louis.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, Citrus Fruit Summary, various issues.

NASS's final box estimates indicate that the decline in total citrus volume was driven by production decreases across all citrus commodities in Florida and a 17-percent decline in Texas grapefruit production. The only citrus commodities with net increases over the last season were Valencia oranges in California (up 3 percent), lemons (up 9 percent), and tangerines in California (up 11 percent). Production declines observed in Florida this season can be attributed to the lingering effects of Hurricane Milton and continued pressure from the devastating disease Huanglongbing (HLB, also known as citrus greening).

California again leads the nation in orange production: California continues to lead the nation in orange production in 2024/25. California first surpassed Florida in combined citrus production in 2016/17 and in all orange (Valencia and Navel and early/midseason) production in 2022/23. With a climate well-suited to the fresh market, the Golden State has long been a top

producer of Navel and early/midseason varieties. More importantly, California has kept its commercial orchards free from HLB infection. California had a slightly smaller Navel and early/midseason orange crop this season at 1.5 million tons (down 1 percent from 2023/24). However, California's Valencia orange crop increased by 3 percent to 292 thousand tons.

Florida's orange production hit a historic low of 12.2 million boxes (549 thousand tons) in 2024/25, the lowest level since 1931. This number represents a 32-percent decrease in Florida orange production from last season. Both early/midseason and Valencia varieties experienced comparable declines. Grower prices (on-tree equivalent) for a box of processing oranges averaged $12.00 (between December 2024 and May 2025), a $3.69 (44-percent) increase from the same period last season.

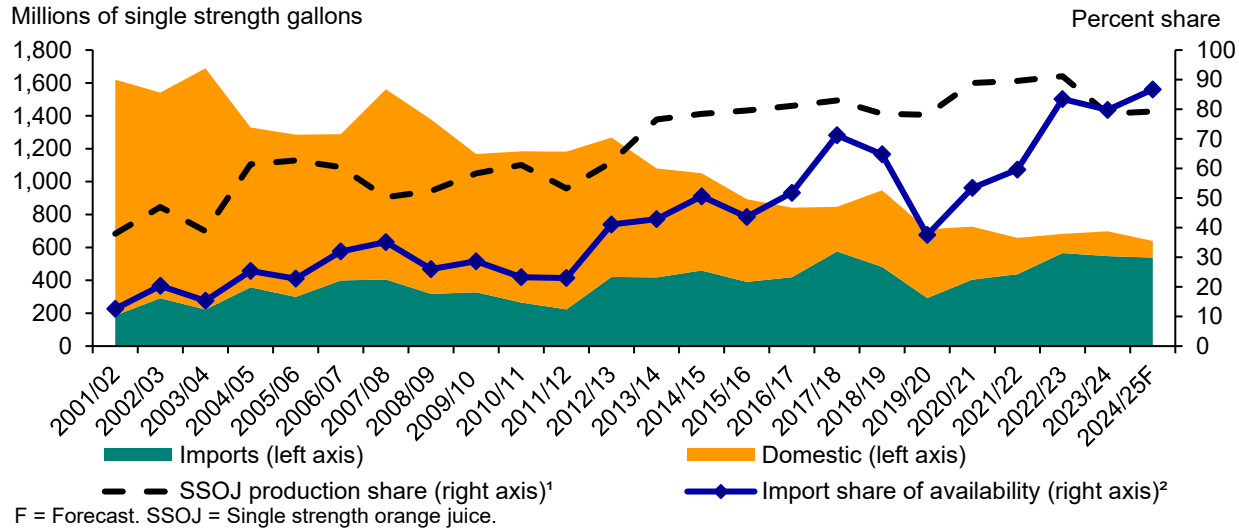
Per capita availability of fresh oranges is forecast up in 2024/25 over last season (2023/24) and, if current trade trends persist, will surpass 8 pounds per person. This increase is due to a smaller share of orange production going to processing, higher import levels, and lower export levels. Fresh orange imports typically peak in the final 4 months of the marketing year (July–October) and will likely exceed 520 million pounds this season. The primary suppliers of fresh orange imports to the U.S. market are Mexico, Chile, and South Africa.

Fresh orange exports are down by 4 percent year to date (November 2024–July 2025) compared to last season and are not expected to surpass 720 million pounds. The primary foreign markets for U.S.-grown fresh oranges are South Korea, Canada, Mexico, and Japan—accounting for 23, 21, 14, and 12 percent of U.S. orange exports in 2024/25, respectively, year to date.

U.S. orange juice industry relies heavily on imports: Various types of orange juice are sold in the United States. The types include frozen concentrated orange juice (FCOJ), not-from-concentrate (NFC) juice, and reconstituted varieties (which may include FCOJ as an input). The Florida Department of Citrus distinguishes between two primary categories of orange juice in its weekly and annual processor reports, FCOJ, and single strength orange juice (SSOJ), the latter which includes both NFC and reconstituted varieties. The harmonized tariff schedule allows one to similarly distinguish between categories of traded orange juice. FCOJ was invented at the end of the Second World War and rapidly became a breakfast staple of U.S. households. Sold in a frozen can, FCOJ stores well, ships well, and is sold on the futures market. Single strength orange juice, especially NFC, is now preferred by the U.S. consumer for taste and convenience. However, SSOJ is more expensive to ship and store. The U.S. Food and Drug Administration requires labeling for orange juice manufactured from any amount of concentrate.

Single strength orange juice now accounts for the bulk of U.S. production. In the 1990s, FCOJ still accounted for most orange juice produced in Florida, fluctuating between 56 and 73 percent. By the 2004/05 season, however, SSOJ (including NFC) surged to 61 percent of Florida-produced orange juice, reaching a peak share of 91 percent in the 2022/23 season (figure 18). The SSOJ share of orange juice imports has also increased since the early 2000s. In the 2001/02 season, SSOJ accounted for only 4 percent of U.S. orange juice imports, with approximately 3.4 million single-strength-equivalent gallons (42 percent of SSOJ imports that year) coming from Brazil. By 2016/17, the SSOJ share of orange juice imports peaked at 60 percent and has since fluctuated between 35 and 58 percent. In the 2024/25 season, it is estimated that around 55 percent of all U.S. orange juice imports will be SSOJ.

Figure 18
Import share of domestic orange juice availability will reach 87 percent in 2024/25



F = Forecast. SSOJ = Single strength orange juice.
¹Not from concentrate share is for Florida produced orange juice only.
² Import share of availability is calculated from production divided by imports plus beginning stocks minus exports minus ending stocks.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Survice, Cold Storage, Florida Department of Citrus, Weekly Processing Reports, and U.S. Department of Commerce, Bureau of the Census.

The import share of orange juice domestic availability first surpassed 50 percent in the 2014/15 season (figure 18). In the 2024/25 season, U.S. orange juice imports are forecast to reach around 500 million gallons (single strength equivalent or SSE), representing more than 85 percent of the total domestic availability. Brazil continues to be the largest supplier of imported orange juice to the United States, followed by Mexico and Costa Rica.

The industry's reliance on imports is largely due to continued production declines in Florida, which has been severely impacted by both disease and adverse weather events. As a result, domestic orange juice production is projected to decrease to approximately 100 million gallons (SSE) for the 2024/25 season. This reduction is a stark contrast to the production figures from two decades ago, which regularly surpassed 1 billion gallons.

Grapefruit production and consumption trends: U.S. grapefruit and orange producers have faced similar challenges. In 2024/25, 299,000 tons of grapefruit were produced in the United States, a 9-percent decline from the previous season. Although California now accounts for the majority (55 percent) of U.S. grapefruit production, Texas and Florida also contribute. Substantial declines in Texas and Florida grapefruit production in 2024/25 (16 and 27 percent, respectively), contributed to the overall reduction in the Nation's grapefruit crop. By contrast, California's grapefruit production increased over last season to 164,000 tons, up 8 thousand tons from 2023/24.

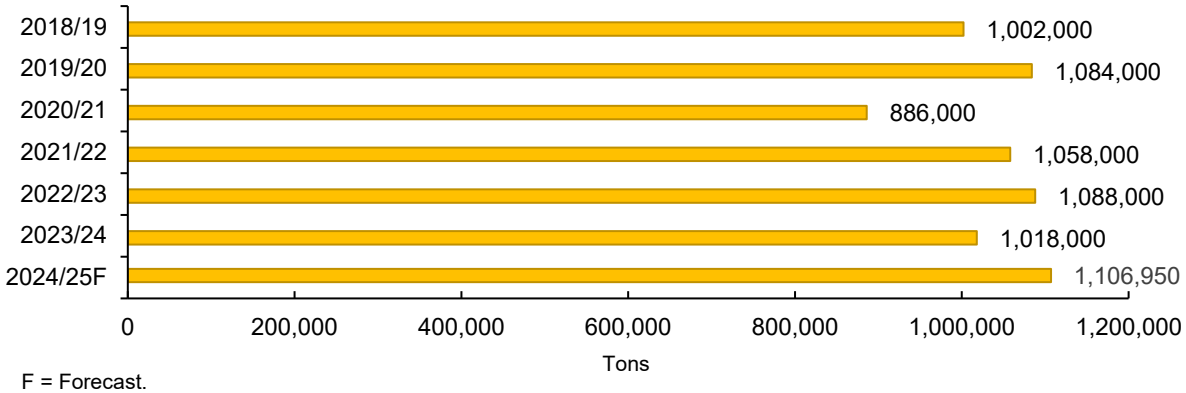
An estimated 63 percent of U.S. grapefruit this season is destined for the fresh market, with the remainder going to processing. Despite this decrease in U.S. grapefruit production compared to last season prices are down slightly. The average on-tree grower equivalent price for a box of grapefruit was $34.02 over the months of October 2024–April 2025, down less than a percent. However, this price is still 28 percent higher than the previous 5-year average.

This season (2024/25), fresh grapefruit imports are trending 11 percent below last year's record high (81.4 million pounds), but if the trend continues, will reach 61 million pounds, still 22 percent higher than the 3-year average spanning 2020/21–2022/23. The U.S. trade balance in fresh grapefruit has changed considerably over the last decade. Imports have mostly trended up since the 2014/15 season, while exports have trended down. At the close of the current marketing year (2024/25), fresh grapefruit imports are expected to account for 17 percent of domestic supply, a significant increase from the 2-percent observed in 2010/11. The United States became a net importer of fresh grapefruit for the first time in 2022/23, and this trend is set to continue in the current 2024/25 season. The top suppliers of fresh grapefruit to the United States are South Africa, Vietnam, and Mexico. With less fruit available this season, U.S. exports of fresh grapefruit are expected to reach 45 million pounds, down 14 percent, season to date (September 2024–July 2025) from last year, and the lowest level in at least 55 years. The primary markets for U.S. fresh grapefruit exports are Canda, Japan, Mexico, and South Korea—which account for 31, 28, 23 and 10 percent of exports (respectively) year to date.

U.S. lemon and tangerine production were up in 2024/25: Lemons and tangerines both had production gains in the 2024/25 season. Driven by larger crops in California and Arizona, total U.S. lemon production increased by 9 percent to 1.1 million tons (figure 19). An estimated 30,000 tons of lemons were also produced in Florida this season, which marks the first season that the USDA, NASS's *Citrus Survey* has collected lemon production data for the Sunshine State. These increases in the U.S. lemon crop can be attributed to favorable weather and increased acreage dedicated to lemon orchards in California.

Figure 19

Lemons: Production forecast is up in 2024/25 on a record California crop



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

Given increases in the volume of lemons produced this season, U.S. imports are down, both for fresh market fruit and lemon juice. Fresh lemon imports reached 373 million pounds, down 12 percent from 2023/24. Lemon juice imports were 48 million gallons, down 6 percent from 2023/24. The primary overseas suppliers of lemons to the United States in 2024/25 were Argentina, Chile, Mexico, and Uruguay—which accounted for 41, 34, 22, and 1 percent of fresh lemon imports to the United States, respectively.

U.S. fresh lemon exports increased this season, reaching 171 million pounds at the close of the 2024/25 season (August 2024–July 2025). This number marks an increase of 5 percent from the 2023/24 season. The primary export markets for U.S.-grown lemons in 2024/25 were Canada, Japan, South Korea, and Mexico—which accounted for 46, 23, 17, and 9 percent of U.S. fresh lemon exports, respectively.

Tangerine production was higher in 2024/25: Tangerine production increased to 1.22 million tons in 2024/25. California, which accounts for over 98 percent of domestic production, saw an 11-percent increase in its tangerine crop, reaching 1.2 million tons. This rise in production is attributable to higher yields and increasing acreage. Florida saw a further reduction in its tangerine crop this season over last season, by 11 percent. Total tangerine production in Florida was estimated at 19,000 tons in (2024/25).

U.S. tangerine imports are expected to reach 1.15 billion pounds by the end of the marketing year (October 2025). If realized this number will be an increase of 14 percent over last season's already historic import volumes. Over the last decade, tangerine imports have trended upwards making up a larger share of the tangerines available for domestic consumption. Over the period spanning 2012/13–2014/15, tangerine imports accounted for 26 percent of domestic supply availability. From 2021/22–2023/24, they accounted for 44 percent of domestic supply

availability. U.S. imports of tangerines are primarily sourced from Morocco, Chile, and Peru—accounting for an estimated 30, 30, and 20 percent of U.S. tangerine imports, respectively.

U.S. fresh tangerine exports increased this season and are expected to exceed 180 million pounds by the end of the marketing year (November 2024–October 2025). Tangerine exports tend to peak in winter and early spring (January–March) when the U.S. harvest is at its peak. Although the United States remains a net importer of tangerines, the export forecast of 180 million pounds is an increase of 37 percent over last season (2023/24), and if realized will be the highest level on record. The primary destination markets for U.S. tangerine exports include Mexico, Canada, and South Korea—and are expected to account for 45, 26, and 10 percent of exports, respectively.

Outlook for the 2025/26 U.S. citrus season: USDA, NASS will release initial 2025/26 forecasts for all-citrus production in the United States in October 2025. However, an early forecast published in the California Department of Food and Agriculture's (CDFA) *2025-26 California Navel Orange Objective Measurement Report* suggests that Navel orange production in California will reach 80 million 40-pound cartons, up 6 percent from the outgoing year (2024/25). The forecasted increase is mostly due to a 6-percent increase in fruit diameter, while the report forecasts a reduction in average fruit set per tree. The CDFA also forecasts in its *2025-26 California Mandarin Objective Measurement Report* that Tango and W. Murcott Afourer varieties of mandarins will reach 33 million 40-pound cartons in 2025/26. The forecasted quantity of Tango and W. Murcott Afourer mandarins exceeds last year's September forecast by 4 million boxes (13 percent).

Note: Starting October 1, 2025, ERS historical reports and data previously hosted on the Mann Library site will remain fully accessible through the National Agricultural Library's platform. New reports and data updates will be released on the ERS website.

Suggested Citation

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