

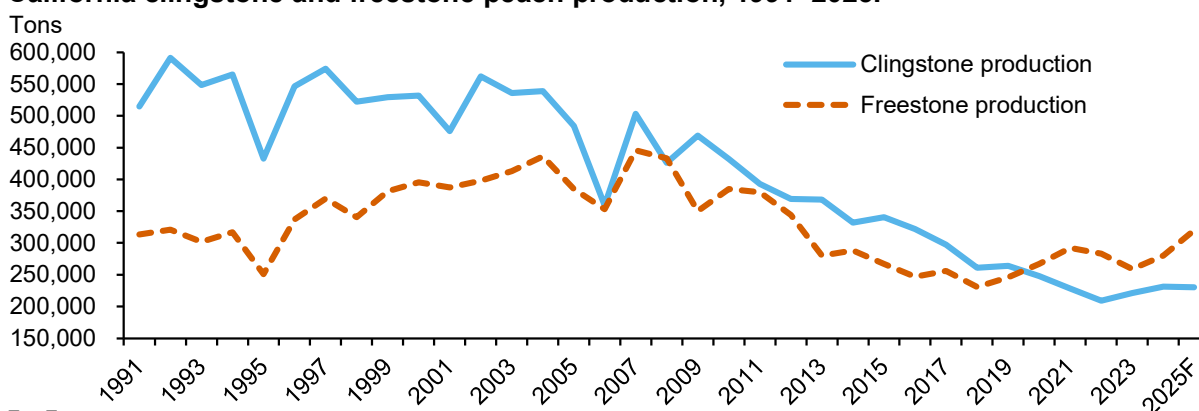
Noncitrus Fruit Outlook

California Peaches: Production Forecast Is Up in 2025

California is the top U.S. peach-producing State, accounting for 75 percent of U.S. production volume and 64 percent of value in 2024. The 2025 USDA, NASS May *Crop Production* forecast for California peach production is 550,000 tons, a 4-percent increase from 2024 and 11 percent higher than the previous 3-year average. California peaches are categorized as either freestone or clingstone varieties. If the 2025 production forecasts are realized for clingstone (230,000 tons) and freestone (320,000 tons), it would mark the 6th year in a row more freestone peaches were produced than clingstones (figure 1). USDA, NASS will release another peach production forecast for California and six additional States in the August *Crop Production* report.

Figure 1

California clingstone and freestone peach production, 1991–2025F



F = Forecast.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, Quick Stats and *Noncitrus Fruit and Nuts Final Estimates* (various issues).

California clingstones: On average, clingstone peaches are grown almost exclusively for the processing market (primarily canned and frozen), while about three-fourths of California freestone peaches are destined for the fresh market. Clingstone peaches are characterized by a firmer flesh that is more tolerant to pitting and heat treatment during the canning process. Clingstone peaches tend to be higher yielding and have lower prices than freestone peaches. After peaking in 2004 at 32,000 acres, California clingstone bearing acreage has steadily fallen, totaling less than 14,000 in 2024. California freestone bearing acreage has also declined since the early 2000s but has increased slightly from a 2017 low (21,000 acres) to 25,000 bearing acres in 2024.

The USDA, NASS May production forecast for California clingstone peaches is a 1,000-ton decrease (-0.4 percent) from last year. Like California cherry growers this season, industry reports note inconsistent fruit set in some clingstone orchards. However, relatively mild

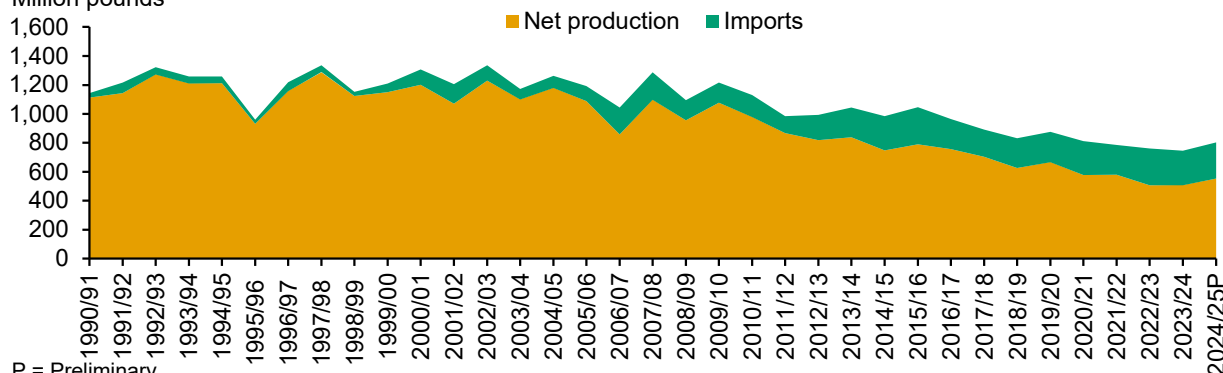
temperatures in June, especially compared to last season's high summer temperatures, have supported fruit development. The harvest of California clingstone peaches typically begins in late June or early July and continues through early September. In early July 2025, the California Canning Peach Association (CCPA), the cooperative bargaining association in the industry, was still negotiating its 2025 base-price agreement with one of the two largest processors. Weekly season-to-date delivered tonnage to peach processors usually reaches the halfway point by early August. After the second week of July 2025, California clingstone peach deliveries totaled about 13,600 tons, a 36-percent increase from the same time last year, based on reports issued by the California League of Food Producers (CLFP). This number represents 6 percent of the season's total expected delivery volume (224,383 tons) to peach processors according to the CLFP *Block-by-Block* 2025 estimate. According to CCPA, California produces nearly all domestically produced canned and plastic-packaged peaches (including mixed fruit products like fruit cocktail).

Canned peach imports: While net production (production minus exports) of canned peaches has trended lower in the last two decades, imports have trended higher. Throughout the 1990s, canned peach import volume was less than 80 million pounds each marketing year and represented less than 10 percent of domestic supply (figure 2). In the last 3 marketing years (2022/23–2024/25), canned peach import volume averaged almost 250 million pounds and accounted for more than 30 percent of domestic supply. The increased share of canned peach domestic supply from imports reflects relatively steady import volume in the last 10 years, coupled with declining domestic production. More than 80 percent of U.S. canned peach imports come from China and Greece. In the past three seasons, canned peach imports from Greece and China each accounted for about 13 percent of domestic supply.

Figure 2

U.S. canned peach domestic availability (product-weight¹)

Million pounds



P = Preliminary.

Note: Season begins in June of the first year shown. Net production equals domestic production minus exports.

¹Domestic canned utilization production estimates converted to product weight. Starting in 2018/19, canned production is based on 5-year average share (75 percent) of total processed production. Product weight is equal to fresh weight multiplied by 1.2.

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

Fresh-market peaches: California freestone harvest begins in late June and continues through September. South Carolina and Georgia (second and third top peach producing States behind California) tend to start the harvest in May and are largely finished by the end of July. Fresh peach shipment volumes of early varieties (May–June) from California were lagging last year according to data from USDA, Agricultural Marketing Service (AMS), *Market News*, but weekly free-on-board (FOB) prices were similar to last season. Clemson Agricultural Extension reports indicate this year’s South Carolina peach crop is generally in fair condition with rainy and humid summer weather leading to increased disease pressure. At the end of June 2025, 81 percent of Georgia’s peach crop was reported in good-to-excellent condition by USDA, NASS, which is similar to the 5-year average. By July 20, 2025, the peach harvest in Georgia was 85 percent complete, similar to the 5-year average (83 percent). This year’s fresh-market peach season will be discussed in more depth in the *Fruit and Tree Nuts Outlook: September 2025*.