

# PRO\*ACT

CONNECTING FARMS | EMPOWERING KITCHENS™

## Crop Update

*April 22, 2026*

### Rain, Transition Gaps, and Berry Demand Keep Markets Tight

This week wasn't without its own set of challenges.

With processors now fully operating in Salinas, the region was immediately met with rain across key Central Coast growing areas including Salinas Valley, Santa Maria, and Oxnard. Growers packed ahead of the weather to help cover orders, but wet fields and muddy conditions slowed harvest activity and will likely create lingering quality concerns in the days ahead.

Rain totals were enough to disrupt normal operations, and as fields dry out we expect the usual post-rain issues to surface: elevated dirt, mildew pressure, shorter shelf life, bottom rot, pin rot in broccoli, and quality pressure on cauliflower and leafy items.

The broader row crop market remains tight, and April continues to shape up as a light supply month. The combination of recent rain, prior heat in Salinas, and the finish of Yuma has left little cushion in the system.

Value-added processors are already feeling the pressure, particularly on lettuce, broccoli, cauliflower, and celery. Expect lighter weights on lettuce and leaf items, while broccoli and cauliflower may show more discoloration and weather-related defects.

Iceberg remains one of the more challenged items. Yields are declining due to increased Fusarium pressure, a soilborne disease favored by warm, wet conditions. Some growers are reporting losses in early plantings, tightening an already snug market. Romaine and leaf items currently have better availability, though markets are expected to strengthen as the week moves on.



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Berries are also facing their own transition challenges.

Oxnard is now well past peak and trending down seasonally, reducing output from what had been a major source of volume. Santa Maria is ramping up, but cooler weather and smaller berry sizing are keeping yields lighter than hoped. Further north, Salinas and Watsonville started early this season, but recent rain and cooler temperatures have slowed momentum after the initial flush of fruit in early April.

The result is a market where multiple regions are producing, but not enough volume is available to fully satisfy demand. Strawberry supplies remain light, and pricing is elevated as buyers compete for limited numbers.

Across the rest of the berry complex, raspberries remain in a demand-exceeds-supply situation, though some gradual improvement is expected later this month as California hoop production begins. Blueberries are slowly improving as California adds volume, but markets remain elevated until the Pacific Northwest starts in mid-May. Blackberries remain light, though pricing has started to ease slightly.

Tomatoes round out the list of challenged items this week.

Supply remains tight due to earlier weather issues in Florida and transition gaps in Mexico. Romas and rounds are especially short, while quality remains inconsistent with sizing and packouts limiting usable volume.

Some improvement is expected later this month, but for now round tomatoes remain one of the most expensive items in the market, with prices staying at extreme levels.

