

# PRO\*ACT

CONNECTING FARMS | EMPOWERING KITCHENS™

## Crop Update

*April 29, 2026*

### Markets Stay Tight as Pressure Builds

There's a lot moving right now, and not much of it is easing up.

Romaine is starting to tighten in Salinas. Growth has been slow, and both field pack and processed supplies are coming in lighter than expected. On top of that, we're seeing demand shift out of iceberg and into romaine, which is adding pressure. Seeder is still an issue and will continue to limit yields over the next couple of weeks.

Iceberg isn't giving us much relief either.

Fields are dealing with Sclerotinia, which is cutting yields and tightening supply. Processors are also stepping into the open market to cover shorts, which is pulling product away from the fresh side and keeping things volatile.

Broccoli and cauliflower are in the same boat. Cooler weather and recent rain slowed things down, and harvests haven't caught back up yet. Yields are lighter, demand is steady, and markets are staying elevated.

Even the light rain over the weekend had an impact.

Salinas, Watsonville, Santa Maria, and Oxnard all saw some moisture. Not a big storm, but enough to slow crews down. When that happens, harvest gets more selective, and yields drop. We're expecting 10-15% less production short term, and with cooler weather this week, things aren't going to bounce back right away.

If there's a slight advantage anywhere, Santa Maria has a little more availability than other regions, but still below normal.



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Asparagus is still extremely tight.

Sonora is wrapping up, Baja is just getting started, and it's not nearly enough to cover near-term demand, especially with Mother's Day coming. Domestic production is late, and frost hasn't helped. Peru is filling in, but quality has been hit or miss and freight is tight.

Bottom line, not much relief here until mid- to late May.

Tomatoes continue to be one of the toughest spots in the market, especially rounds.

Mexico remains extremely tight on round tomatoes due to recent weather and reduced acreage, keeping prices elevated. Florida is starting to help, with Central production getting underway and expected to build this week, while South Florida winds down. That should bring some gradual relief, but not immediately.

Romas are tightening as well, especially out of Florida as growers move into later picks. Demand has picked up as buyers look for substitutes for rounds, keeping markets firm. Mexico remains limited, though new production out of Jalisco and Baja is starting to come online and should build over the next few weeks.

Grape and cherry are the only ones showing some improvement. Florida and Baja are adding volume, quality is good, and markets have started to ease. That trend should continue into May.

With Mother's Day around the corner, the Central Coast is basically one weather event away from getting even tighter.

We've got weather, disease pressure, and transition gaps all hitting at once. Supply is tight, markets are elevated, and flexibility is going to matter over the next few weeks.

