

PRO*ACT

CONNECTING FARMS | EMPOWERING KITCHENS™

Crop Update

April 8, 2026

Transition Is Upon Us

We're in the transition window. Product is shifting, crews are adjusting, and markets are starting to climb.

The first full week of April marks a key shift across the industry, as processors make their move back to Salinas and the spring transition gets underway.

As expected, the move doesn't come without some friction. Early in the transition, we typically see slower load times as new crews get acclimated to the region and operations reset for the season. At the same time, many growers are now into their third week of harvesting in Salinas, and markets are starting to respond.

We're already seeing upward pressure on lettuce, romaine, broccoli, Brussels sprouts, and celery as the desert winds down and the coast ramps up.

Broccoli is a good example of where things are headed. Desert production is finishing up with lighter yields and some quality pressure from recent heat, while Salinas is just getting going. Quality out of the gate looks good, but supplies remain limited industry-wide, keeping markets elevated through April. Pest pressure is already being noted in some lots, which will be something to watch as we move forward.

Brussels sprouts and celery are following a similar pattern. The initial flush of supply has passed, yields are coming in lighter, and markets are beginning to inch higher. Celery, in particular, is seeing the typical tightening as the desert deal wraps up, with Oxnard bridging the gap before Salinas gets fully underway.



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Berries are also in transition, but in a much different way.

Strawberries are now coming out of all five growing regions, with warmer weather earlier in the season pushing production forward. Santa Maria is ramping up with strong quality, while Salinas and Watsonville have started earlier than expected and are looking clean with the current cooler conditions. Oxnard is just past its peak and starting to taper.

The result is a split market, with southern fruit trading lower and northern districts holding firmer pricing.

Across the rest of the berry complex, supply remains tight. Blueberries, blackberries, and raspberries are all in a demand-exceeds-supply situation as we wait for California and the Pacific Northwest to ramp up over the next several weeks.

Citrus is also entering a transition window.

Navels are beginning to wind down, with the crop continuing to peak on larger sizes. As we shift into Valencias, expect a different look and profile. Valencias tend to carry more seeds and have a slightly different color internally, but will become the primary orange in the market as we move deeper into spring.

Lemons continue to be impacted by coastal growing conditions in District 2, where wind and moisture are pushing more fruit into choice grade. Supplies of small fancy-grade lemons are expected to be extremely limited, as sizing has skewed larger across the crop.

We're in that in-between window. Things will smooth out, but not overnight.

