

# PRO\*ACT

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## Crop Update

*December 17, 2025*

### Winter Volume Builds as Holiday Demand Tapers

As the industry heads into Christmas week, markets are settling into a familiar late-December pattern. Holiday demand is beginning to wind down while winter growing regions continue to build volume, creating generally good supplies across most categories, with a few exceptions. With improved overall availability, the focus is shifting toward execution and quality.

Lettuce supplies continue to build across the Arizona-California desert region as favorable growing conditions support increased production. Iceberg, romaine, and green leaf volumes have all picked up over the past week, easing markets and improving overall availability. Quality is generally good, though lighter weights remain common as many growers entered fields early to meet Thanksgiving demand. Warmer desert temperatures are expected to support continued growth and help weights improve as the season progresses. Southeast production is beginning to ramp up and should provide additional coverage into early spring. Mexican iceberg and romaine continue to ship steadily, with good quality and favorable weights reported.

Strawberry production is trending higher as multiple regions contribute simultaneously. Mexico and South Texas volumes are increasing daily, while Florida continues to harvest despite some weather-related slowdowns. In California, Santa Maria and Oxnard are recovering from earlier storms, with limited harvests underway as fruit continues to color. Quality remains variable depending on origin. Mexico and Florida have reported white shoulders, green tips, and occasional bruising, while California fruit has shown some pin rot and green shoulders. Berry counts are generally running in the low- to mid-20s per 8/1 clamshell.



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As volume builds, markets across all growing regions have softened, opening the door for increased promotional activity heading into year-end.

While overall supply is improving, a few items remain challenged heading into the end of December. Green onion availability remains tight as desert growing regions recover from recent rainstorms and intermittent border delays. Wet field conditions in the Mexicali region have slowed harvests and reduced yields, while labor constraints through the holiday season continue to limit production. Quality has ranged from fair to average, with some lots showing increased susceptibility to decay due to earlier wet conditions. Pricing is expected to remain elevated.

Brussels sprouts remain one of the most constrained items in the market. The Salinas season is entering its final weeks, and recent heat and rain have significantly impacted yields and quality. Supplies in the Arizona-California desert region are expected to remain very limited through December, with small sizing, discoloration, and puffiness prevalent. Larger sizes remain particularly difficult to source. Mexican production is expected to begin late this month, with more meaningful volume anticipated in early January, providing some relief after the first of the year.

Heading into Christmas, volume continues to build across lettuces and strawberries, while a handful of row-crop items remain limited. As holiday demand slows, this week's market will be less about availability and more about managing quality, timing, and expectations ahead of the post-holiday reset.

