

# PRO\*ACT

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## Crop Update

*June 3, 2026*

### Romaine Calm, Lettuce Rebound

Romaine and romaine hearts remain the main focus this week as supplies continue to tighten across the Salinas Valley. Markets have moved higher over the past two weeks and are expected to remain elevated into mid-June, at minimum. Disease pressure, uneven stands, and recent weather interruptions are all reducing harvestable yields and keeping availability limited.

Romaine production is being impacted by a combination of soil-borne disease, INSV pressure, and inconsistent field development. Sclerotinia and Verticillium are showing up in several growing areas, creating plant loss and lowering field productivity. INSV also remains a concern, with thrips activity spreading the virus and leaving affected plants unharvestable. Growers are also seeing uneven stands tied back to the extreme heat in March, followed by cooler weather and rainfall through April. The result is less usable acreage, lighter yields, and continued pressure on both romaine and romaine heart supplies.

Iceberg has also reversed course and is moving higher as disease pressure increases. INSV, Sclerotinia, internal burn, and mildew are all contributing to lower yields in current fields. Quality remains fair to good overall, but the issue is how much product can be harvested and packed. Green leaf remains limited as well. Mexico is tapering off as it moves into its lower-volume summer window, while regional programs in the Midwest, Northeast, and Canada should begin adding supply through June. Until those programs build meaningful volume, lettuce markets are expected to stay active.

Strawberry supplies remain limited due to cooler weather and recent rainfall across the main production areas. Harvest crews are expected to slow as fields require some cleanup and culling following the rain. Salinas and Watsonville have not yet reached full production due to the prolonged cold pattern, but plants are showing good vigor with plenty of green to light red fruit. A slight warming trend next week should help improve output. Santa Maria is beginning its seasonal decline, with the strongest quality still coming from west-side fields.



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Blueberry supplies remain in good shape across California, Central Mexico, North Carolina, and Georgia, with Oregon and Washington expected to begin contributing soon. Blackberry and raspberry production remains steady out of Central Mexico and California, with lighter demand helping keep those markets manageable.

Lime production is increasing, and the market has softened with more fruit becoming available. That said, large sizes remain a smaller percentage of the crop. Consistent rain is in the forecast and could interrupt harvests this week, which may keep pricing near current levels. If rainfall is lighter than expected, the market could continue to ease. Tabasco volume has increased, but that fruit has been more affected by recent heat. Veracruz remains the preferred region for better quality.

Avocado markets have started to settle after last week's sharp spike. As pricing climbed, picking increased to chase the stronger market, and that fruit now needs to move through the supply chain. The market may continue to adjust if supply and demand find a better balance, but suppliers are expected to manage harvests closely to support pricing where they can. Large fruit remains limited, and California will continue to help where available.

Overall, lighter school demand should help ease some pressure, but it will not be enough to fully offset reduced yields in romaine, romaine hearts, iceberg, and strawberries. Lead time and flexibility will remain the biggest help in fulfilling orders as we work through this stretch. Regional lettuce programs, warmer weather, and improving production will bring some relief later in June, but the next few weeks will still require close attention.

