

PRO*ACT

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Crop Update

October 22, 2025

Cooler Days Ahead, Navels Step In

We're down to the final few weeks of the Salinas season, and the challenges in the field haven't let up. After multiple rain events earlier this month and a stretch of warm, humid weather, growers are still managing quality issues across key row crops like iceberg, romaine, and broccoli. The forecast has stabilized a bit, but disease pressure remains high and yields continue to slip. Crews are trimming aggressively to keep cartons clean, which is keeping supply tight and case weights low. Value-added packs are still seeing early breakdown and discoloration.

The citrus front is transitioning fast. The first California navels are officially in, with harvest ramping up this week in the Central Valley. Quality looks strong and fruit is coloring up naturally with the cooler overnight lows, reducing the need for gassing. We're seeing a size profile peaking on 72s and 88s — larger than last year's crop — which bodes well for retail programs heading into November. Valencia's are wrapping up and should be mostly cleaned up within the next 7 to 10 days. Meanwhile, District 3 lemons are hitting their stride, with more consistent volume and improved quality compared to the last few weeks.



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Strawberries are still feeling the aftershocks of early October rain. Quality remains mixed, with high cull rates in Santa Maria and Oxnard. Supply is limited, open market fruit is scarce, and we expect that situation to stay tight until Mexico begins crossing product in mid-November. Blueberries, raspberries, and blackberries are also in various stages of seasonal transitions, with Mexico slowly ramping up. Markets remain firm across all berry commodities.

And while fall crops are peaking in the Northwest, logistics remains the largest challenge. Potato, onion, and apple supplies are promotable, but with Q4 freight rates ticking up, especially out of Idaho and Washington, it's becoming harder to find capacity that aligns with current FOBs.

We're hearing consistently that limited carrier availability is tightening the window on when product can be effectively moved and increasing the overall landed cost.

This time of the year always demands a little more patience, flexibility, and planning. Keep your turns tight, lean on us for real-time updates, and stay proactive as we inch closer through transition.

