PRO*ACT

CONNECTING FARMS | EMPOWERING KITCHENS™

Crop Update

October 28, 2026

The Desert Is Calling

We are officially in transition.

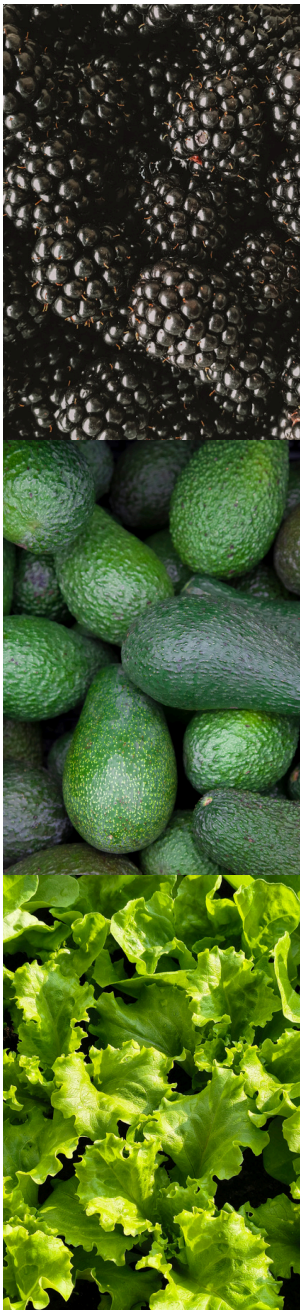
After weeks of talking about declining Salinas yields, disease pressure, and tight lettuce supplies, we are finally starting to see some relief. Iceberg and romaine volume has improved as Huron and Oxnard add production, and the first desert harvests are getting very close.

That doesn't mean we're out of the woods yet.

Salinas and Santa Maria are still finishing with low yields and plenty of disease pressure, including INSV and Sclerotinia. Some fields are simply running out of usable product. Green leaf remains especially tight, while iceberg and romaine markets have finally started moving in the right direction.

Huron has been a much needed bridge. Quality has been very good, weights have improved, and additional volume is taking some pressure off the market. The real relief comes as the Arizona-California desert ramps up. We are essentially in the last leg of tight lettuce supplies before Yuma begins carrying more of the load.

Berries are a very different story. California strawberries took another major hit from the recent combination of heat followed by rain. Growers are culling heavily damaged fruit, with losses in some fields estimated at 50% to 60% of the current crop.

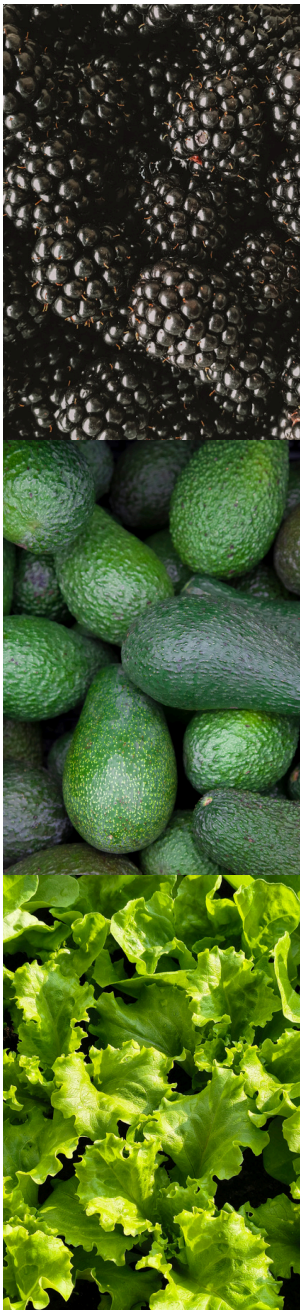


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Santa Maria is nearing the end of its season, and some fruit is being diverted away from the fresh market because it simply will not hold up. Oxnard growers have cleaned up damaged fields and are waiting for the next flush of good fruit to color before harvesting.

That leaves strawberry supplies extremely limited. Demand continues to exceed supply, open-market fruit is difficult to find, and shippers are focused heavily on contracts and existing commitments.

Normally, Mexico would be starting to provide more relief by now, but Central Mexico and Baja are also running behind after recent weather. Volume is beginning to build, but meaningful Mexican strawberry production is still several weeks away.

Blackberries and raspberries are in a better position. Mexican blackberry production is recovering from recent rain, while raspberry supplies are currently adequate and expected to increase as we move through November. Strawberries remain the berry item creating the biggest challenge.

Avocados are another market worth watching closely. Harvesting remains suspended in Michoacán, Mexico's primary avocado-producing region, with no confirmed timeline for when it will resume. Discussions are ongoing, but for now the interruption continues.

Jalisco is still harvesting and averaging about 3 million pounds per day, but that is not enough to replace the volume normally coming out of Michoacán.

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The U.S. does have some cushion. Industry inventory is currently around 58 million pounds, and Week 43 inbound volume actually exceeded sales, with about 64.2 million pounds arriving against 52.8 million pounds sold. That gives the market some breathing room in the short term.

The concern is what happens if the interruption drags on.

Even after Michoacán starts harvesting again, fruit still has to be picked, packed, inspected, transported, and distributed before it reaches customers. Programs that rely on conditioned or ripened fruit will feel that delay first.

For now, avocado supplies remain manageable, but every additional day of disruption increases the risk of tighter availability and higher pricing.

This week feels like a market starting to turn the corner, but not all at once. Lettuce is finally getting closer to relief, strawberries are still working through some of the toughest conditions of the season, and avocados have become the latest item to watch closely.

For lettuce, all eyes are now on Yuma. We've spent weeks getting to this point, and the desert is calling.

