

## *Crop Update*

**February 18, 2026**

### **Post-Valentine Reality Check**

With Valentine's Day behind us, the berry category is working through its reset.

Strawberries are mixed depending on origin. California is dealing with meaningful rain in Santa Maria and Oxnard, which will limit field access and trim yields in the short term. Growers packed ahead of the storm, but disruptions are expected through the week. Central Mexico is moving down its seasonal curve with fewer crossings into Texas. Baja is gradually increasing production. Florida has rebounded with better volume following earlier cold weather. With holiday demand behind us, pricing is adjusting region by region, but West Coast weather will keep supplies from getting loose.

Blueberries remain tight. Chile, Central Mexico, and California are all reporting lighter numbers. Demand continues to outpace supply, and markets remain elevated through the balance of February.

Blackberries and raspberries are also firm. Cooler temperatures have limited production, particularly out of Mexico, keeping availability measured.



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In the desert, lettuce supplies improved slightly this week. Some temporary relief showed up, especially on iceberg, as demand softened around the holiday. That said, fields are still running ahead of schedule, and once movement builds again, expect the market to tighten back up. Romaine continues to perform well with good color and strong hearts. Green leaf is steady but not loose.

Broccoli and cauliflower remain snug. Central Coast production has been impacted by cool weather and rain, and while Mexico is contributing volume, it's not enough to create surplus conditions. February should stay firm.

Brussels sprouts have improved considerably after several weeks of elevated markets. Availability is better across both commodity and value-added packs, and pricing has eased.

Green onions continue to be a watch item. Earlier production challenges are still showing up in sizing, with small profiles dominating. Supplies are steady but tight, and delayed plantings could create another narrow window in March.

Supplies are in a better spot than we were two weeks ago on several items, but nothing is long. As demand normalizes and we move deeper into the back half of the desert season, markets won't need much of a push to firm again.

