

PRO*ACT

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Crop Update

August 26, 2026

September Brings a Shifting Supply Picture

As we close out August, a little more demand is starting to come back into the market. Schools are in full swing, universities are ramping up, and that added pull is starting to show up just as some of our summer crops are getting a little tired.

Here in the Salinas Valley, lettuce and leaf markets are beginning to move higher. Iceberg has led the way, with romaine and green leaf starting to follow. There is still product, but disease pressure from INSV and Sclerotinia, along with mildew, insects, internal burn and lighter weights, is taking a bite out of yields. Planted acreage may look adequate on paper, but the more important number right now is how much of that acreage can actually be harvested and packed. With demand improving at the same time, we should expect these markets to stay active as we move into September.

On the citrus front, the small-size shortage we have been talking about for months never really went away. A combination of offshore imports and lighter summer demand gave the market a little breathing room and, at times, a false sense of availability. Now that schools are back and demand has returned to more normal levels, we are being reminded that the California size structure has not changed.



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Valencias remain heavily weighted toward larger fruit, while 113s and 138s are extremely limited. Imports will continue to help, but small fruit is expected to remain tight through the balance of the Valencia season and likely into the beginning of the California Navel crop in October. Lead time and flexibility on size, grade and country of origin will remain important.

Berries are also in a bit of a transition. Salinas and Watsonville strawberry production continues to decline while Santa Maria slowly improves. Blueberries are moving away from Pacific Northwest production and more toward imports from Peru and Mexico, while raspberries remain in better shape. Strawberries are still the main item to watch, with elevated markets and tighter supplies expected to continue.

As we head into September, there is still plenty of product moving through the system, but we are starting to lose some of the cushion we had earlier in the summer. School demand is back, Salinas growers are fighting for harvestable yields, small citrus remains tight, and berries are moving between growing regions. Nothing unusual for this time of year, but definitely a few more reasons to stay close to the market over the next several weeks.

