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Crop Update

November 4, 2026

A Little Breathing Room

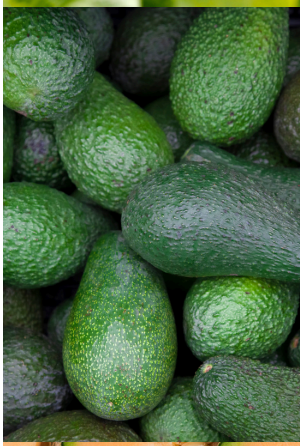
We are right in the heart of transition.

Huron, Oxnard, and early Yuma volume are finally starting to take some pressure off Salinas and Santa Maria, but we are still a couple of weeks away from having the full desert program's volume behind us. Major processors are expected to have their salad plants fully fired up around November 16, which should bring a more meaningful increase in volume and consistency.
For now, iceberg and romaine markets are easing, green leaf is still tight, and we are starting to see the first signs that the worst of the row-crop squeeze is behind us.

Strawberries are unfortunately moving in the opposite direction.
California continues to struggle after the recent stretch of heat followed by rain. Cull rates have been running as high as 50% in some areas, and much of the fruit being harvested simply does not have the shelf life needed for longer transit.

Santa Maria is nearing the end of its season, with very little fruit making it into the fresh market. Oxnard is still cleaning up after the weather and waiting for the next flush of undamaged fruit to color.







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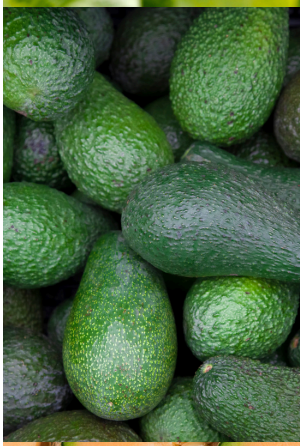
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Normally, Central Mexico and Baja would be starting to take some pressure off California by now, but those regions have also been slowed by rain and delayed production. Some Mexican volume is beginning to move through Texas, but supplies remain limited.



That keeps strawberries firmly in a demand-exceeds-supply situation, with very little open-market fruit available and shippers focused heavily on contracts and existing commitments.



Melons are also moving through a seasonal handoff.
Arizona cantaloupe production is underway, but yields are running below the summer California deal. Recent rain around Yuma slowed harvests, and the crop is concentrated mainly in 9- and 12-count fruit, with jumbo sizes especially limited.



The Arizona season will begin winding down over the next few weeks just as Mexico and Central American imports start coming into play. Honeydew supplies are in a better position, with steady availability today and Mexican production gradually increasing.

The bigger story with melons is timing. We are working through the final domestic desert supplies while waiting for Mexico and imports to carry more of the load, which should keep cantaloupe markets firm through the rest of November.

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Avocados remain the market to watch most closely.
Harvesting in Michoacán is still largely suspended, and there is still no clear indication of when normal operations will resume. Jalisco continues harvesting, but its volume is not enough to replace what the U.S. normally receives from Michoacán.

The cushion we had a week ago is also getting smaller. U.S. avocado inventories have fallen about 15%, from 49.9 million pounds to 42.4 million pounds, with the entire decline coming from Mexican-origin fruit.
That does not mean the market is out of avocados today, but the pipeline is clearly getting tighter.

Even when normal harvesting resumes, there will be a delay before that fruit reaches customers. It still has to be harvested, packed, inspected, transported, and in many cases conditioned before it is ready to ship.

For now, pricing is expected to remain elevated while the industry works through the interruption and rebuilds inventory.

This week brings some much-needed relief on lettuce, but the market is still far from quiet. Strawberries remain extremely tight, melons are working through their seasonal handoff, and every additional day of disruption in Michoacán keeps pressure on the avocado market.



