



Weekly Market Review June 19, 2026

Overview

Production will slowly increase over the next two weeks out of South Georgia and South Carolina; Mexico production seems to be lighter on Rounds and Romas while Snacking Tomatoes were very short this week. Most likely pre-Fourth of July retail demand. We are also seeing a few more growers out of California ramping up, which will bring more fruit to market. The Lime market will start to ease back as more volume crosses the border with peak sizing on small fruit. 175s and larger will be short with substitutions to smaller sizes necessary for the next several weeks. Hot Pepper production expected to stabilize for most varieties: Shishito and Red Fresno continue to be the shortest. Table grapes are tight this week due to the transition from Mexico to California; we may also see higher demand for Table Grapes and Stone Fruit as melon supplies are very short going into the Fourth of July holiday.

The market remains volatile, especially on Iceberg, Romaine and Romaine Hearts. Disease pressure and hot weather are affecting harvestable acreage. We are seeing high markets and shortages on multiple items. Demand exceeds supply for many commodities. Artichokes, Anise/Fennel, Brussels Sprouts, Red Leaf and Green Leaf have limited supplies. Iceberg and Romaine remain at the extreme trigger level. Prorates should be expected on those items. Carrot quality and supplies have improved. The market has recovered. Brussels Sprouts are tight and are expected to have limited supplies until July. **Iceberg and Romaine coverage will be a factor for the remainder of this week and going into next week.** Growers anticipate supply issues throughout June on leafy greens.

US Avocado volume saw a 10% total increase from all countries of origin last week. Even as Mexico's main season winds down they still contribute over 50% of the volume. While harvesting the Loca crop has started, we are a couple of weeks away from seeing a major shift to the new crop. California and Peru increased production, providing steady supply to cover demand. Most cantaloupe shippers were able to find a way to ship something out of Arizona this week. Next week will be more difficult as both cantaloupes and honeydews become even tighter. The whiteflies damaged crops and caused viruses that lead to the lack of products and current gap we are experiencing. This is expected to be short lived as California harvesting should start at the end of next week. Honeydews out of Mexico also saw a decrease in volume last week, but it's expected to return to normal to help keep the market stable. Honeydews in California will not see good production until the beginning of July. Pineapple availability has improved and is expected to have good volume for the next 3-5 weeks.

Berry availability remains mixed as Strawberry and Raspberry production continues to strengthen in California, while Blueberry supplies tighten due to seasonal declines in Mexico and weather-related slowdowns in California. We are roughly 2 weeks from the start of PNW, which will help Blueberry supplies. Blackberry volumes remain limited but are expected to improve as California production ramps up toward summer peak harvests. Overall quality across all berry categories remains good, with weather continuing to influence regional production levels and short-term supply trends.

Citrus markets are experiencing tight supplies on smaller sizes across many varieties, including Lemons, Navels, Valencias, with fruit generally trending large. Some suppliers are holding averages on Lemons due to transitioning districts and tightening supplies. Please be in close contact with your supplier on this matter and give ample lead time. Domestic Meyer Lemons are coming to an end, and imports will begin in late June. California Valencias are beginning in a small way, and some suppliers are reporting that there will be challenges in supply on Valencias this season. Some are having to sub with imports to cover contracts. Mandarin availability is mixed, and Grapefruit supplies are available. Please begin considering imports for this summer. They will offer relief on strained sizing, especially for people on the East Coast.

Freight: Limited trucks and record high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including sea freight companies, invoking fuel surcharges which will impact cost inputs.

Fuel Surcharges: Growers are beginning to implement fuel surcharges. We will continue to closely monitor fuel costs, which have been steadily increasing and impacting all aspects of operations — from field activities to freight. These rising costs affect not only the business overall, but also the individuals who keep operations moving, including drivers and field crews. Fertilizer costs are also rising significantly and will directly impact growers moving forward. This is becoming more of a daily conversation and having surcharges added to prices is something that seems inevitable with more growers and we go into the summer months.

Market Alert List

- *Asparagus – ESCALATED*
- *Artichokes – EXTREME*
- *Cantaloupe – EXTREME*
- *Fennel, Anise – EXTREME*
- *Green Leaf/Red Leaf Lettuce – EXTREME*
- *Honeydews – EXTREME*
- *Lettuce, Iceberg – EXTREME*
- *Limes (175's and larger) – ESCALATED*
- *Pepper Green Bells – ESCALATED*
- *Romaine – EXTREME*
- *Romaine Hearts – EXTREME*
- *White Asparagus – ESCALATED*

Watch List

1. *Blackberries*
2. *Blueberries*
3. *Broccoli*
4. *Brussels Sprouts*
5. *Cabbage, Green*
6. *Cauliflower*
7. *Herbs*
8. *Ginger*
9. *Small Citrus Sizes across all Varieties*
10. *Sugar Snap and Snow Peas*
11. *Table Grapes*
12. *Tomatoes: Grapes and Cherry*

Fruits & Vegetables

Tariff Update: President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.

Avocados: Total US volume last week hit 64.9 million pounds, an increase from the previous week. All countries of origin saw an increase in production last week to help keep up with demand. Mexico sent 36.2 million pounds to the US last week, dry matter remains high at 36%. California harvested 19.3 million pounds a week, and Peru had a 109% increase with 8.5 million pounds. The Mexican Loca crop is still a couple weeks away from providing meaning volume. We can expect to see a shift in dry matter, from 36% to the mid to upper 20% and in the size profile, favoring smaller fruit.

Bananas: Banana supply will be stable, but production curtailed due to virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program. Bunker rates will be released this week and next, expect them to be higher due to rising fuel costs.

Pineapples: The Pineapple market has improved and volume from Costa Rica has increased over the last 2 weeks. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, the quality and taste are good.

Table Grapes: WATCHLIST Quality is starting to decline on the Mexican Fruit as the season begins to wrap up. Quality is fair with smaller sizing prevalent and lower brix across all varieties. Coachella is packing red and green grapes with much different quality; we should transition soon to Arvin.

Berries

Strawberries: Strawberry supplies remain stable overall, with Santa Maria volumes holding steady despite some acreage transitioning to frozen production, while Watsonville and Salinas continue to see strong and increasing harvests. Quality in Santa Maria is fair to good, with elevated temperatures creating some pressure from soft and overripe fruit, though field management continues to minimize pack-out issues. Watsonville and Salinas fruit quality remains strong with good size and firmness, with only minor bruising reported. Supplies are expected to remain adequate, supported by continued production growth from Northern California regions.

Blackberries: WATCHLIST Blackberry supplies remain somewhat limited as ongoing rain and elevated temperatures continue to impact production and fruit sizing. Mexican quality remains strong overall, although weather has affected firmness and size in some areas. California production in Watsonville is still in its early stages with excellent fruit quality, but current volumes remain light. Availability is expected to improve gradually through the summer, with peak production anticipated later in July as harvests continue to ramp up.

Raspberries: Raspberry supplies remain favorable with strong quality reported in both Mexico and Watsonville. Mexican production continues to deliver fruit with excellent color, firmness, and flavor, and peak volumes are expected to continue through the coming months. Watsonville's early crop is showing excellent firmness, appearance, and eating quality, although current volumes remain light. Production is expected to increase meaningfully as the California season continues to develop, supporting improved availability in the weeks ahead.

Blueberries: WATCHLIST Blueberry supplies are becoming more limited as Mexican production enters a seasonal decline and California Central Valley volumes slow due to weather-related challenges. Quality remains generally good across all growing regions, with Mexico reporting good bloom, flavor, and only minor weather-related defects. Central Valley quality is fair to good, while initial harvests are beginning in Ukiah and the Pacific Northwest with promising crop conditions and excellent early quality. Markets are expected to tighten as current production transitions between regions before Northwest volumes fully ramp up.

Citrus

Limes: ESCALATED Supply continues to improve despite heavy rains in Mexico but still experiencing issues with sizing on fruit out of Mexico and other regions across Central America; the size distribution will continue to skew heavy to 230 ct and 250s. Unfortunately, this is leaving larger sizes such as 175's and larger extremely tight. We are also seeing moderate pressure on quality with imperfections present, such as oleocellosis. Markets are expected to remain firm through June with World Cup taking place here in the United States expecting to keep summer demand higher than normal. Due to limited sizing on the larger end of the scale, we are still seeing some need for subs over to smaller sizes will be necessary for the next few weeks.

Lemons: 140/165/200's are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve. There are also averages in place.

Navels: Manifest is peaking on 72/88's. Extremely tight on 113's and 138's. This is also putting pressure on the 88's – be prepared to be offered 72's on many orders.

Valencia's: California Valencia's are set to begin in a small way and are projected to have similar issues on sizing.

Mandarins: Mandarins are finishing up and imports are coming in. Be in contact with your supplier on other varieties or imports as alternative options.

Grapefruit: California grapefruit available!

West Coast Lettuce

Iceberg: EXTREME Lettuce quality is good, but supplies are **EXTREMELY** limited. Weights will be light. Heads will be small. Shortened shelf-life issues should be expected. Growers are holding to averages when they can but prorates should be expected. Lettuce supplies will be limited throughout June. **Iceberg VA: EXTREME** Quality is good, but supplies are **EXTREMELY** limited. We have seen reports of short shelf life, insect pressure, and mildew in bags. Growers are holding to averages when they can but prorates should be expected.

Romaine & Romaine Hearts: EXTREME Romaine and Romaine Hearts' quality is fair, and supplies remain **EXTREMELY** limited. There have been reports of bruising, fringe burn, light weights, and mildew on the outer leaves. Growers are holding to averages when they can, but severe prorates should be expected. Romaine supplies look to remain limited throughout June. **Romaine VA: EXTREME** Quality is okay, but supplies are extremely limited. Prorates should be expected. We are seeing more core in the bags and some mildew.

Boston/Butter Lettuce: Quality and supplies look good.

Green Leaf, Better Burger and Red Leaf: EXTREME Quality is good and supplies have improved.

Green Bell Pepper: ESCALATED Light supply out of South Georgia in the east and Coachella/Central Valley (Arvin) Scathing this week. Quality is good out of all regions.

Color Bell Pepper: Good supply available out of Coachella and South Georgia this week. Quality is outstanding on open field varieties. The Hot House Pepper category steady out of Canada and Mexico. Coachella should start by Mid-May. Overall, quality is good.

Jicama: New crop available. Quality is excellent.

Mini Sweet Pepper: Supply will be light over the next week. Quality remains good.

Mixed Chili Pepper: Supplies stable on most varieties. Decent numbers crossing from Mexico; Coachella and South Georgia are ramping up as well. Markets remain very short on Fresnos and Shishito. Fresnos- We recommend subbing to Red Jalapeno. Steady volume is also available on red, orange and green Habanero out of S. Florida (Imports from the DR).

Tomatillo: Good supply and quality available this week.

Eggplant: Steady supply out of South Georgia, Coachella and Central Valley Quality is fair. Mostly seeing choice available with #1 fruit being limited. This should improve over the coming weeks as production improves, and fields are cleaned up.

Slicer Cucumbers: Supply crossing through Nogales and McAllen will tighten up as the season starts to close and transitions to Baja. In the east we are seeing good supply out South Georgia. Quality is good from all shipping points.

English Cucumbers: Excellent supply out of Canada and still some crossings available in McAllen. Quality is good.

Pickles: Lighter supply available out of South Georgia, Florida and Mexico. Quality is good.

Green Beans: Beans are done in Florida and completely transitioned to South Georgia while California is seeing lighter supply. We are also seeing lighter crossing from Baja this week due to cooler weather ultimately putting upward pressure on the West Coast prices. Overall, the quality is good.

French Beans: Production out of Guatemala has declined due to ongoing rainfall, resulting in more active market conditions. Despite the weather-related challenges, supplies of both organic and conventional French beans from Guatemala continue to improve. Conventional French bean availability out of Mexico remains strong, helping support overall market supply.

Zucchini/Yellow Squash: Steady supply on green and yellow out of South Georgia and Fresno. Quality is good.

Herbs: WATCHLIST Basil supply and quality continue to improve. Supplies remain steady with fair quality across most other herb varieties, with the exception of savory and lemon thyme.

Melons

Cantaloupe EXTREME: Some shippers in Yuma have finished early, while others will be extremely limited next week. There were some areas in Yuma that were affected less by the Whitefly's and virus and there are some areas in Florida with some cantaloupe, but the market will be extremely limited. Any volume available will be 15ct.

Honeydew EXTREME: Yuma's Honeydew availability has dropped off, and some shippers are completely out. Mexican production dropped off some leaving the overall market hurting. Mexico production should increase this week, and California will get started in early July. There is some external scarring due to high winds, but overall quality is good.

Watermelon: The market has tightened up some due to lack of products out west, forcing the Southeast to handle all US demand. The fourth of July pull will put upward pressure on pricing and will remain increased until mid-July. The quality in GA and FL has been good.

Mixed Vegetables

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages.

Asparagus: ESCALATED Mexican production out of Baja remains steady, while Washington has completed its season. Michigan and Canadian production are expected to continue for approximately two more weeks before winding down. Peruvian production remains slow due to seasonal factors and current market conditions. Markets continue to be relatively quiet as multiple regions remain in production; however, activity is expected to increase over the next two to three weeks as regional transitions begin and supplies tighten.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality and supplies are good. A few reports of browning and pin rot continue.

Broccolini and Sweet Baby Broccoli: Quality is good, but supplies are still limited with some growers.

Brussels Sprouts: WATCHLIST Quality is fair and supplies are limited. Growers are still combating insect pressure and internal browning. The weather in MX is warming up and that is also causing quality issues and reduced yields there. Growers are holding to strict 10-week averages and are expecting the market to tighten further. Supplies will be limited until July, and the market is rising due to the limited supplies.

Carrots (JUMBOS, MEDIUMS and CELLOS): Quality is good and supplies have improved. The market has finally recovered.

Cauliflower: WATCHLIST Quality is good and supplies have improved.

Celery: Quality and supplies have improved. Disease pressure is still a factor, especially on organic celery but overall quality and supplies look good. Organic Celery is still at an extreme level.

Corn, Sweet: Steady supply out of South Florida and South Georgia; In the west Brentwood is going strong; higher demand is putting upward pressure on the market and seeing a split between east and west pricing for certain this week. Quality is good out of all regions.

Fennel: EXTREME Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though proration has been observed.

Kale: Quality and supplies look good.

Leeks: Quality and supplies look okay.

Garlic: Quality remains good, although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and markets are steady.

Green Cabbage: *WATCHLIST* Supplies and quality are good.

Green Onions: Supplies and quality are good.

Mushrooms: Supply is expected to be steady for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years Canadian mushroom Farmers received unfair subsidies giving them a clear advantage over the domestic mushroom farming industry. USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62-4.97%. These duties will be applied once the ruling is formally published This will not only increase the price of import mushrooms from Canada but certainly put upward pressure on price of domestically grown product as well; this is something Domestic growers have been seeking for some time to support the increases in their operating cost the past five years.

Napa Cabbage: Quality and supplies have improved.

Parsley (Italian & Curly): Quality and supplies are good.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

Red Cabbage: Quality looks good, but supplies are light.

Spinach: Supplies and quality look good.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: *WATCHLIST* Supply of Guatemalan snow peas and sugar snaps have declined, with ongoing rainfall continuing to impact overall quality. Peruvian production remains limited, providing minimal supplemental volume to the market. Mexican snow pea and sugar snap production has concluded for the season, leaving domestic supplies to help fill demand. Domestic availability is currently fair, though markets may tighten if quality challenges persist in Guatemala.

Onions:

New Mexico volume will start to decrease over the next 2 weeks as they finish up harvesting their main variety. Production will pick up a few weeks later, but the yield on the next crop will not be as high. Production in Central California is going strong, but with the reduction in New Mexico volume, the market will get tighter. Overall, quality remains good in both areas.

Potatoes:

The market has strengthened as the size profile has shifted to finish out the last year's crop. Suppliers are seeing a shift in the size profile towards smaller count sizes 70-120ct while 40-60cs have become tighter. Suppliers are watching inventories closely to make sure there is enough to last until new crop and to check for quality issues. Shippers are requesting additional lead time and some flexibility on sizing when possible.

Sweet Potatoes: The sweet potato market has tightened as the industry moves into the final stretch of the 2025 storage crop. Limited supplies remain available nationwide, but inventories are gradually declining, particularly on premium U.S. No. 1 grades and larger counts. Demand from both retail and foodservice continues to remain steady to strong, supporting a

firmer market heading into summer. North Carolina and Mississippi growers are reporting lighter yields and tighter availability due to weather-related challenges from last season. Quality remains generally good; however, some lots are showing increased cosmetic defects and shrink tied to weather stress from last growing season. New crop harvest is expected to begin in limited volumes during August, with broader availability arriving in September.

Tomatoes:

Tomato Suspension Agreement Update

Currently, duties are being imposed on Mexican tomatoes. We do expect to see some reporting from the ITC on the impacts of duties and anti-dumping violations sometime this year. NO major immediate changes are anticipated.

East Coast

- **Round and Roma Tomatoes:** Volume will be lighter this week on rounds out of South Georgia and South Carolina due to weather-related pressure combined with high demand for pre-4th retail pulls. We expect to see these numbers improve over the coming weeks when Tennessee and North Carolina begin harvesting somewhere around July 10th. Quality is good out of all regions.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: WATCHLIST** Lighter volume this week on grapes, medley and cherries due to transition and higher holiday demand. Markets expected to remain active through the 4th. Quality is good.

Mexico

- **Round Tomatoes:** Supply was lower this week on rounds and markets were higher, mostly on mid-sized fruit out of Mexico. Quality is outstanding on what is crossing this week.
- **Roma Tomatoes:** Excellent supply and quality available out of Jalisco and Baja. We expect this trend to continue and get back to a stable market over the next 7 to 10 days. Quality is outstanding
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: WATCHLIST** Grape Tomato and Cherries are very short this week due to lighter harvesting and higher demand. Medleys seem to be readily available. Quality on what is crossing the border has been good on all varieties.

California

- First grower out of the Central Valley started production this week, more to follow over the next ten days. Crops look amazing and expect a great California season on vine ripens as well as mature greens.

Other Fruit:

Apples: As we move through the summer storage season, Washington apple inventories continue to trend below both last year and historical averages across many key varieties, supporting the firm pricing environment that has developed throughout 2026. According to the most recent storage reporting, total conventional apple inventories stood at 39.4 million cartons, down 12% from 44.9 million cartons last year and slightly below the three-year average of 40.4 million cartons. The market will remain elevated until new crop apples start in August.

Pears: D'Anjou availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. Red D'Anjou pears are moderately available in US #1 35–55ct sizes and should remain in the market for another month, with new crop Starkrimson pears expected to start mid-August. Both Bartlett and Bosc pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Limited Supply out of Israel.

Asian Pears: Lighter volume, good supply on larger sizes.

Cherries: Good supply out of Washington State. **NEW CROP.**

Stone Fruit: Steady supply out of California.

Papaya: Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

Mangoes: Steady supply out of Mexico Peru and Puerto Rico. Varieties: Tommys, and Ataulfo.

Kiwi Fruit: Supplies fair out of California as well as offshore landing on the East Coast.

Quince: Limited supply available this week.