



Weekly Market Review June 5, 2026

Overview

Steady production out of the South this week as Georgia and South Carolina ramp up; Florida will wrap up their season over the next few days. We have seen some steady rainfall that slowed production over the past 10 days, but that is changing as we experience a much drier pattern this week. Mexico is also seeing steady supplies out of all three border crossings; California has started in a small way this week as well. The Lime market will start to ease back as more volume crosses the border with peak sizing on small fruit. 175's and larger will be short with substitutions to smaller sizes necessary for the next several weeks.

The market remains volatile, especially on Iceberg and Romaine. Disease pressure is affecting harvestable acreage. We are seeing high markets and shortages on multiple items. Demand exceeds supply for many commodities. Artichokes, Brussels Sprouts, Celery, Fennel, Red Leaf and Green Leaf have extremely limited supplies. Iceberg, Romaine, and Green Leaf remain at the extreme trigger level. Prorates should be expected on those items. Carrot supplies are still slightly limited, but quality and supplies have improved. We should see full relief in the next 2 weeks. Iceberg, Romaine and Green Leaf coverage will be a large factor for the remainder of this week and going into next week. The Iceberg market has shifted once again and prorates are likely with some growers. Brussels Sprouts are expected to have limited supplies until July. Growers anticipate supply issues continuing for the next several weeks.

The Avocado market remains unsettled, while Mexican production increased last week for the first time since April it decreased this week. The increased harvest last week helped restock US inventories and provided some pricing relief. It's unclear how this reduction in production this week will affect the market, shippers still have high priced product from last week and are waiting to see where the field pricing settles. California is providing extra product that has great quality, Peru has increased volume and is expected to double in the next two weeks. Mexican growers will start testing their Loca crop next week and if it meets the required spec can begin sending to the US. Until there is consistent volume from Peru and the Loca crop June will be rocky for pricing, but supplies will be available. Cantaloupes in Arizona are dealing with Whiteflies damaging the crop, causing viruses, reducing yields and causing a much smaller size profile. Warmer temperatures brought the start of season on early, and now Yuma is now projected to finish two weeks before California is ready, causing a gap. Honeydews yields are down as well but Mexican volume is keeping the market steady. Pineapple availability has loosened up some but is not expected to last. The Berry market remains generally stable, supported by production from Mexico and increasing California volumes across most categories. Strawberry supplies remain somewhat constrained following recent weather disruptions, though conditions are improving and production is expected to increase in the coming weeks, while Blackberry, Raspberry, and Blueberry quality remains strong with promotable volumes available. Looking ahead, the primary market concern remains blueberries, where an anticipated transition gap between California and Pacific Northwest production could tighten supplies and drive higher pricing later this summer.

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 June. California Valencia's are beginning in a small way, and some suppliers are reporting that there will be challenges in supply on Valencias this season. 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.

Market Alert List

- *Avocados – EXTREME*
- *Asparagus – ESCALATED*
- *Artichokes – EXTREME*
- *Boston/Butter Lettuce – ESCALATED*
- *Cabbage, Red – ESCALATED*
- *Cantaloupe – ESCALATED*
- *Carrots – EXTREME*
- *Celery – ESCALATED*
- *Fennel, Anise – EXTREME*
- *French Beans – ESCALATED*
- *Green Leaf/Red Leaf Lettuce – EXTREME*
- *Kale – EXTREME*
- *Lettuce, Iceberg – EXTREME*
- *Limes – ESCALATED*
- *Napa – ESCALATED*
- *Parsley Italian – ESCALATED*
- *Romaine – EXTREME*
- *Romaine Hearts – EXTREME*
- *White Asparagus – ESCALATED*

Watch List

1. *Blackberries*
2. *Blueberries*
3. *Brussels Sprouts*
4. *Cabbage, Green*
5. *Herbs*
6. *Pineapple*
7. *Ginger*
8. *Cantaloupe*
9. *Small Citrus Sizes across all Varieties*
10. *Sugar Snap and Snow Peas*

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: EXTREME Mexican growers wanting to capitalize on the higher pricing increased harvesting last week. This added relief to pricing and helped replenish the dwindling US inventory. Mexico sent 45 million pounds to the US last week, dry matter remains high at 37%. California harvested 14 million pounds a week, a slight decrease due to Memorial Day. Ocean containers from Peru are increasing weekly but we are still a couple weeks away from volume that can hopefully stabilize the market. The Mexican Loca season is that usually starts in July has recently been approved to start next week.

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.

Pineapples: WATCHLIST The Pineapple market remains tight as demand continues to be high. 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: Quality remains strong on the red, green and black varieties crossing from Mexico; Good sizing and good Brix numbers are being reported. We expect to see a stable market as well as a smooth transition being volume has ramped up out of Coachella.

Berries

Strawberries: Strawberry markets are slightly higher this week. Harvest activity was significantly impacted by adverse weather conditions late last week, resulting in very light production volumes and limited harvesting opportunities across growing regions. Growers prioritized picking ahead of the weather where possible, but overall yields remained below expectations. Conditions have since been improving, though the market continues to feel the effects of weather-related production disruptions. Overall quality remains good across all growing regions, with only occasional reports of bruising, overripe fruit, and slightly smaller sizing, while misshapen fruit has improved. No rainfall is forecast in the growing regions, and strawberries should begin to increase in the coming weeks.

Blackberries: WATCHLIST Blackberry markets are expected to remain stable with strong Mexican production continuing through the next two months while California harvests slowly ramp up. Mexican supplies remain at peak levels, though warmer temperatures have slightly impacted berry size and firmness. Watsonville crop development continues to progress well, though cooler weather has slightly delayed timing, with conventional harvest expected to begin around June 1 and organic production projected to start in early July.

Raspberries: Raspberry markets are expected to remain promotable through the remainder of May with strong Mexican production continuing to drive supply. Mexico remains in peak volume with excellent color, firmness, and flavor being reported across both conventional and organic fruit. Watsonville production remains in early-stage harvest conditions with light volumes expected over the next two weeks before a more meaningful increase begins in early June.

Blueberries: WATCHLIST Blueberry markets are expected to remain relatively steady over the next two weeks as California production continues to offset declining Mexican volumes and as the Florida and Georgia seasons conclude. California's Central Valley peaked last week with strong conventional and organic volumes, while Mexican production is slightly higher week over week but is expected to gradually decline through June. Quality remains strong overall, with excellent bloom, crisp texture, and flavor being reported from California, while Mexico is seeing only minor heat-related defects. Looking ahead, the California season is expected to finish earlier than normal, and current projections indicate the Pacific Northwest crop may not begin in time to replace those volumes seamlessly. This is expected to create a supply gap between production regions, which will likely tighten availability and drive significant market increases as buyers compete for limited supplies until Pacific Northwest harvests reach meaningful volume.

Citrus

Limes: ESCALATED Supply continues to improve 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 Mid-June with the long-term outlook expectations of downward pressure on fob prices. Subbing to smaller sizes will be necessary through Mid-June to keep the supply chain stable over the next several weeks. Overall quality is expected to decline due to weather-related pressure.

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. **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 for the next few weeks. **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: ESCALATED Quality is good, but supplies are limited. Mildew and fringe burn pressure have been observed.

Green Leaf, Better Burger and Red Leaf: EXTREME Quality is good, but supplies are limited. Mildew and fringe burn pressure persist, and carton weights remain light.

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 can be reached.

Green Bell Pepper: Steady supply out of South Georgia in the east and Coachella/Central Valley in the west. México is about done and will see limited volume crossing through McAllen; Nogales should be wrapping up for the season very soon. 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 stable 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 will be shorter this week on Fresnos and Shishito.

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: Florida is about done for the season, and we have transitioned to South Georgia. California supply is steady. Overall, quality is good, but the overall market is limited this week.

French Beans: ESCALATED Production out of Guatemala remains strong, with supplies of both organic and conventional French beans continuing to improve. French bean availability from Mexico remains fair, providing additional support to overall market availability.

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 ESCALATED The size profile remains heavy on the smaller sizes due to Whiteflies damaging the crop and causing viruses. The Yuma season is now expected to end early, causing a gap until California starts. This could potentially be a 2-3 gap where supplies will be extremely limited.

Honeydew: Sizing on Honeydew has also shifted; growers are getting more 8ct and less 5ct. Mexican product has offered bigger sizes to complement the smaller US fruit. There is some external scarring due to high winds, but overall quality is good.

Watermelon: The market has plenty of supply and is gearing up for the big 4th of July pull. All growing regions in the US are experiencing good quality, and pricing has dropped ahead of the holiday.

Mixed Vegetables

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market.

Asparagus: ESCALATED Mexican production out of Baja continues to improve, while Washington, Michigan, and Canadian growing regions are all reporting good volume and steady availability. Peruvian production has slowed due to current market conditions and reduced demand. Overall, markets have become less active as multiple regions remain in strong production, resulting in improved supply and more balanced market conditions.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: 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): EXTREME Supplies remain tight on Baby Carrots, Cellos, and Jumbos. Rainbow Carrots remain steady with good quality and supply. Availability will remain limited for just a few more weeks. Relief is on the horizon Growers request orders to be sent in as early as possible. At least 7-10 days ahead of time.

Cauliflower: Quality is good and supplies have improved.

Celery: ESCALATED Quality is just okay and supplies are limited. Disease pressure and increased demand are contributing to the increased pricing. Growers are holding to averages but supplies are improving.

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 prorates have been observed.

Kale: Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

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: Quality looks good and supplies are okay. Growers are still holding to averages.

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: EXTREME Quality is okay, but supplies are extremely limited. The hot weather is affecting growth and adding insect pressure.

Parsley (Italian & Curly): Supplies are good, but some growers have light supplies. Italian Parsley remains escalated.

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: ESCALATED Quality looks good, but supplies are light.

Spinach: Supplies are a little tight, but quality looks good. Reports of weak texture, discoloration, and wilting continue.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: WATCHLIST Supply of Guatemalan snow peas and sugar snaps remain steady, though recent rainfall may create some quality challenges. Mexican snow pea supplies continue to be stable, while sugar snap availability has improved to fair levels.

Onions:

California and New Mexico have good volume and the market is steady. Production in Central California has started and is continuing to ramp up in volume in the coming weeks. Overall, quality has been 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 begin to decrease out of Western Florida and transition to South Carolina and South Georgia. We should see consistent numbers out of these two regions then move to Tennessee and North Carolina by July 10th. Quality is good out of all regions.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato:** Volume improving grape tomatoes while medley and cherries remain short.

Mexico

- **Round Tomatoes:** Supply will be steady as growers break newer blocks on the Baja and Southern Mexico. Quality is outstanding on what is crossing this week.
- **Roma Tomatoes:** Improving 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:** Grape Tomato supply will improve this week crossing through Nogales and McAllen. Grape Medley and Cherry tomatoes will remain very short. Quality on what is crossing is good.

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: The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the

growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

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: Starting in California, **NEW CROP.**

Stone Fruit: Ramping up out of California.

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

Mangoes: Light supply out of Mexico Peru and Puerto Rico. Varieties: Kents, 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.