

# The Source

## Commodity of the Month - Potatoes

### MARKET ALERTS

**Asparagus:** Asparagus supplies remain tight due to limited production, strong demand, and quality challenges in Mexico and Peru. Conditions are expected to remain below normal through summer.

**Blackberries:** Blackberry supplies remain very limited as California production is slow. Oregon and Washington volume is not expected until late July.

**Citrus (Lemons):** Lemon supplies remain tight with strong demand keeping markets elevated. Relief is expected in July as imports increase.

**Melon (cantaloupe):** Offshore cantaloupes are finished, leaving limited domestic supplies. White fly impacted California Desert production, creating a temporary gap until Central California volume increases.

**Melon (honeydew):** Offshore and Mexican honeydews are finished, leaving limited domestic supplies. White fly impacted California Desert production, creating a supply gap expected through the week of 7/6.

**Melon (watermelon):** Watermelon supplies are tightening as Mexico crossings decline and domestic production remains limited, pushing markets higher.

**Onions:** Texas and Georgia onion supplies are ending, with Central California and New Mexico taking over summer production. Freight remains a key market driver.

**Pineapple:** Costa Rica supplies remain steady, while Mexico volumes decline, keeping the market tight. Larger sizes should improve by late July, but crownless and organic supplies remain limited.

**Potatoes:** Large potato supplies are tightening due to lower pack outs. Washington quality remains strong, while yellows and sweet potatoes remain limited.

**Raspberries:** Raspberry supplies remain very limited due to regional transitions and slow California production. Baja volume is expected to improve in late July.

**JULY 8, 2026**

### CROP UPDATES

Melons remain the main focus as the industry works through a difficult transition from the desert to the San Joaquin Valley. Cantaloupe supplies are improving slowly with good quality, but markets will remain elevated until volume increases. Honeydews are tighter, with limited availability expected in the near term. Lemons remain firm due to limited domestic supplies, larger sizing, and reliance on imports. Strawberries are steady, with warmer weather expected to improve production, while blueberries continue to build as Northwest and Michigan supplies increase. Blackberries and raspberries remain in transition as Mexico winds down and California gradually gains volume.

[Read more](#)

### WEATHER

**California:** Warm conditions continue through the weekend, with peak heat expected Thursday and Friday.

**Mexico:** Scattered showers and thunderstorms are expected across Central Mexico through the weekend, with seasonably warm temperatures continuing.

**Florida:** Warm and humid conditions continue across Florida through July 12, with highs in the 90s and isolated showers possible.

**Arizona:** High pressure will bring extreme heat through the weekend, with highs near 110° and increasing winds. Scattered storms may bring gusty winds across Arizona.

### FREIGHT

We are seeing improvements in capacity this week from US growing regions as the 4<sup>th</sup> of July holiday is now passed. We look forward to the remaining summer months being active, yet more manageable.

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LOGISTICS

### IN PEAK SEASON

- Carrots
- Grapes
- Stone Fruit
- Citrus (Oranges)
- Strawberries

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# Commodity Updates



## Apples

Galas and Granny Smiths remain in good supply. New-crop Wildfire Galas are just a couple of weeks away, followed by Granny Smiths about two weeks later. Honeycrisp prices are easing as shippers prepare for next month's new crop. Red and Golden Delicious have finally seen modest price increases as inventories continue to tighten.

| Commodity/Region                      | Supply | Price  | Quality |
|---------------------------------------|--------|--------|---------|
| Yakima, Washington<br>(August - July) | Light  | \$\$\$ | Good    |



## Asparagus

**ALERT**

Asparagus supplies remain tight, with strong demand, elevated FOBs, and quality challenges in both Mexico and Peru due to unfavorable growing conditions. Limited production and competition from export markets are expected to keep supplies below normal and quality variable through the summer.

| Commodity/Region                        | Supply | Price  | Quality |
|-----------------------------------------|--------|--------|---------|
| Caborca<br>(Year Round)                 | Light  | \$\$\$ | Fair    |
| Peru<br>(Year Round)                    | Light  | \$\$\$ | Good    |
| Ohio/NC/MI/NJ<br>(June - September)     | Light  | \$\$\$ | Good    |
| Mexico (Ciudad Obregon)<br>(Year Round) | Light  | \$\$\$ | Good    |



## Avocados

Markets are beginning to stabilize, with pricing easing from the highs seen over the past few weeks. Additional relief is expected as Flora Loca volume increases each week. Current Negra fruit continues to eat well with high oil content but is ripening quickly. Early Flora Loca harvests are underway and will build steadily as more growers begin picking, while California remains active and Peru is expected to ramp up in the coming weeks.

| Commodity/Region             | Supply | Price  | Quality |
|------------------------------|--------|--------|---------|
| Mexico<br>(Year Round)       | Steady | \$\$\$ | Good    |
| California<br>(April - July) | Light  | \$\$\$ | Good    |



## Bell Peppers

Eastern supplies remain tight during the seasonal transition. Michigan and Ohio are expected to begin this weekend, while Fresno production continues to build but has not yet reached peak volume. Overall supplies should improve as California and Washington ramp up.

| Commodity/Region                    | Supply | Price  | Quality |
|-------------------------------------|--------|--------|---------|
| California<br>(May - October)       | Steady | \$\$\$ | Good    |
| Georgia<br>(May - June)             | Light  | \$\$\$ | Good    |
| Ohio/NC/MI/NJ<br>(June - September) | Light  | \$\$\$ | Good    |

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Berries (Blackberries)

**ALERT**

Blackberries will remain in very short supply as California production continues to progress slowly. Harvests from Oregon and Washington are not expected until late July, leaving demand well above current available supply.

| Commodity/Region           | Supply | Price  | Quality |
|----------------------------|--------|--------|---------|
| California<br>(Year Round) | Light  | \$\$\$ | Fair    |



## Berries (Blueberries)

The Pacific Northwest is gaining momentum after a slow start to the season caused by recent rainfall. Supplies from New Jersey remain limited, while Michigan began harvesting last week. However, unfavorable weather has impacted both yields and fruit quality in the region. Overall, the market continues to trend lower, with the majority of available volume coming from Oregon and Washington.

| Commodity/Region           | Supply | Price  | Quality |
|----------------------------|--------|--------|---------|
| California<br>(Year Round) | Steady | \$\$\$ | Good    |



## Berries (Raspberries)

**ALERT**

Raspberries will remain in very short supply as late-season Central Mexico production transitions to new growing regions. California harvests are progressing slowly due to cooler temperatures, while Baja production is expected to increase in late July, helping to improve overall availability.

| Commodity/Region           | Supply | Price  | Quality |
|----------------------------|--------|--------|---------|
| California<br>(Year Round) | Light  | \$\$\$ | Fair    |



## Berries (Strawberries)

Supplies remain steady as growers continue to see harvest volumes increase with more moderate daytime temperatures across California. Santa Maria is harvesting light volumes of new-crop strawberries, with production expected to build over the coming weeks. Market conditions remain firm, with some signs of easing.

| Commodity/Region           | Supply | Price  | Quality |
|----------------------------|--------|--------|---------|
| California<br>(Year Round) | Steady | \$\$\$ | Good    |

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Broccoli

Broccoli supplies are slightly tighter heading into the weekend, with the market expected to firm modestly next week.

| Commodity/Region                        | Supply | Price  | Quality |
|-----------------------------------------|--------|--------|---------|
| Mexico<br>(Year Round)                  | Steady | \$\$\$ | Good    |
| Santa Maria, California<br>(Year Round) | Steady | \$\$\$ | Good    |
| Salinas, California<br>(May- October)   | Light  | \$\$\$ | Good    |



## Brussel Sprouts

Brussels sprout supplies are slightly limited, with overall good quality. The market is expected to remain steady, with the potential for a slight increase next week.

| Commodity/Region                                | Supply | Price  | Quality |
|-------------------------------------------------|--------|--------|---------|
| Mexico<br>(December-August)                     | Steady | \$\$\$ | Good    |
| Oxnard / Salinas, CA<br>(May - July) (July-Dec) | Steady | \$\$\$ | Good    |



## Carrots

The Bakersfield region is currently the primary growing area, with good availability and strong supplies across all carrot varieties.

| Commodity/Region                                 | Supply | Price  | Quality   |
|--------------------------------------------------|--------|--------|-----------|
| Imperial Valley<br>(February - May)              | High   | \$\$\$ | Excellent |
| Kern County<br>(October - Feb)                   | Steady | \$\$\$ | Good      |
| Various Northwest<br>Regions<br>(July - October) | Steady | \$\$\$ | Good      |



## Cauliflower

Cauliflower supplies remain slightly tight, with the market expected to strengthen further heading into next week.

| Commodity/Region                        | Supply | Price  | Quality |
|-----------------------------------------|--------|--------|---------|
| Mexico<br>(Year Round)                  | Steady | \$\$\$ | Good    |
| Santa Maria, California<br>(Year Round) | Light  | \$\$\$ | Good    |
| Salinas, California<br>(May - October)  | Light  | \$\$\$ | Good    |



## Celery

Supplies remain plentiful in Santa Maria, Oxnard, and Salinas, keeping the market steady. All sizes are available, production is strong, and quality remains good. Promote aggressively while supplies are abundant.

| Commodity/Region                   | Supply | Price  | Quality |
|------------------------------------|--------|--------|---------|
| Oxnard, California<br>(Year Round) | Steady | \$\$\$ | Good    |

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Citrus (Grapefruit)

Star Ruby supplies are available, with peak sizing at 48 count. Fruit is shipping from both Riverside and the San Joaquin Valley.

| Commodity/Region        | Supply | Price  | Quality |
|-------------------------|--------|--------|---------|
| California (Year Round) | Steady | \$\$\$ | Good    |
| Texas (October - April) | Light  | \$\$\$ | Good    |



## Citrus (Lemons)

**ALERT**

The lemon market remains elevated due to tight supplies and strong demand. Pricing is expected to stay firm near term, with relief anticipated in July as offshore imports increase. District Two (Ventura/Oxnard) is in full production and supplying the majority of volume.

| Commodity/Region                      | Supply | Price  | Quality |
|---------------------------------------|--------|--------|---------|
| Oxnard/Ventura (February - September) | Light  | \$\$\$ | Fair    |
| San Joaquin Valley (October - May)    | Light  | \$\$\$ | Good    |



## Citrus (Limes)

Lime supplies remain plentiful, with promotional opportunities on smaller sizes while larger fruit continues to command premium pricing due to limited availability. Mexico will remain the primary supplier through the summer, with rain expected to support future production but potentially slow harvests if excessive.

| Commodity/Region      | Supply | Price  | Quality |
|-----------------------|--------|--------|---------|
| Veracruz (Year Round) | High   | \$\$\$ | Good    |



## Citrus (Oranges)

California Valencia oranges are heavily weighted toward larger sizes, with 56ct and 72ct fruit most available. Smaller sizes remain extremely limited and will require flexibility, with substitutions to larger sizes likely to maintain coverage.

| Commodity/Region                | Supply | Price  | Quality |
|---------------------------------|--------|--------|---------|
| San Joaquin Valley (Year Round) | Light  | \$\$\$ | Fair    |



## Cucumber

Eastern production remains light as crops transition north. Baja supplies have been impacted by weather, but quality remains good. Availability is expected to improve over the next couple of weeks.

| Commodity/Region                 | Supply | Price  | Quality |
|----------------------------------|--------|--------|---------|
| Mexico (November - May)          | Steady | \$\$\$ | Good    |
| Baja California (May - October)  | Steady | \$\$\$ | Good    |
| Ohio/NC/MI/NJ (June - September) | Light  | \$\$\$ | Good    |

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Eggplant

Georgia's season is winding down, putting upward pressure on pricing. California production is increasing but has not fully offset tighter Eastern supplies. Markets are expected to remain elevated into early July as East Coast harvests improve.

| Commodity/Region                 | Supply | Price  | Quality |
|----------------------------------|--------|--------|---------|
| California<br>(May - October)    | Light  | \$\$\$ | Good    |
| Ohio/NC/MI<br>(June - September) | Light  | \$\$\$ | Good    |



## Garlic

Shipments transitioned to Mexican peeled garlic on June 22, 2026, and will continue through late July to early August when new California crop becomes available.

| Commodity/Region                        | Supply | Price  | Quality |
|-----------------------------------------|--------|--------|---------|
| East Coast<br>(Year Round)              | Steady | \$\$\$ | Good    |
| Bakersfield, California<br>(Year Round) | Steady | \$\$\$ | Good    |
| Gilroy, California<br>(Year Round)      | Steady | \$\$\$ | Good    |



## Grapes

The grape market has adjusted to promotable levels, with excellent supplies of red grapes and good availability on greens. Quality remains excellent.

### Grapes (Green)

| Commodity/Region       | Supply | Price  | Quality |
|------------------------|--------|--------|---------|
| Mexico<br>(May - June) | Steady | \$\$\$ | Good    |

### Grapes (Red)

| Commodity/Region       | Supply | Price  | Quality |
|------------------------|--------|--------|---------|
| Mexico<br>(May - June) | High   | \$\$\$ | Good    |



## Green Onions

Green onion supplies remain good overall, with the market expected to stay steady into next week, weather permitting.

| Commodity/Region       | Supply | Price  | Quality |
|------------------------|--------|--------|---------|
| Mexico<br>(Year Round) | Steady | \$\$\$ | Good    |



## Kale

Kale supplies and quality remain good overall, with conditions expected to stay steady into next week.

| Commodity/Region                       | Supply | Price  | Quality |
|----------------------------------------|--------|--------|---------|
| Mexico<br>(Year Round)                 | Steady | \$\$\$ | Good    |
| Oxnard, California<br>(Year Round)     | Steady | \$\$\$ | Good    |
| Salinas, California<br>(May - October) | Steady | \$\$\$ | Good    |

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Lettuce Iceberg

Production remains strong across both northern and southern regions, with shippers offering flexibility. Promote aggressively as sizing, weights, and quality remain excellent. Demand is softer with schools out, and value-added items are currently down.

| Commodity/Region                            | Supply | Price  | Quality |
|---------------------------------------------|--------|--------|---------|
| Santa Maria, California<br>(March-December) | Light  | \$\$\$ | Fair    |
| Salinas, California<br>(May - October)      | Light  | \$\$\$ | Fair    |



## Lettuce Leaf

The romaine, green leaf, and red leaf markets remain steady. Supplies have improved significantly, with romaine hearts well below recent highs. Ideal weather and reduced school demand have created excess availability, while quality remains strong with minimal fringe and tip burn reported.

| Commodity/Region                       | Supply | Price  | Quality |
|----------------------------------------|--------|--------|---------|
| Salinas, California<br>(May - October) | Steady | \$\$\$ | Fair    |



## Lettuce Tender Leaf

Spinach, arugula, and spring mix supplies remain strong for normal demand, with good quality reported across all items.

| Commodity/Region                   | Supply | Price  | Quality |
|------------------------------------|--------|--------|---------|
| Mexico<br>(Year Round)             | Steady | \$\$\$ | Good    |
| Oxnard, California<br>(Year Round) | Steady | \$\$\$ | Good    |
| Yuma, Arizona<br>(November - May)  | Steady | \$\$\$ | Good    |



## Melon (Cantaloupe)

**ALERT**

Offshore cantaloupes are finished for the season, with domestic melons now supplying the market. California Desert growers were impacted by white fly, causing an earlier-than-expected shutdown and a temporary supply gap before Central California production was ready. Contracts remain a priority but are being prorated, with sizing substitutions likely. Tight supplies are expected through the week of 7/6.

| Commodity/Region                    | Supply | Price  | Quality |
|-------------------------------------|--------|--------|---------|
| Central America<br>(December - May) | Steady | \$\$\$ | Good    |

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Melon (Honeydew)

**ALERT**

Offshore and Mexican honeydews are finished for the season, leaving domestic production as the primary supply source. California Desert growers were impacted by white fly, causing an earlier-than-expected shutdown and a temporary supply gap before Central California was ready. Contracts remain a priority but are being prorated, with sizing substitutions likely. Tight supplies are expected through the week of 7/6.

| Commodity/Region                    | Supply | Price  | Quality   |
|-------------------------------------|--------|--------|-----------|
| Central America<br>(December - May) | Steady | \$\$\$ | Excellent |



## Melon (Watermelon)

**ALERT**

Mexican watermelon crossings have declined, pushing markets higher. Domestic watermelon supplies are available but limited, while rain in Georgia and Florida has delayed production and increased holiday demand.

| Commodity/Region                             | Supply | Price  | Quality |
|----------------------------------------------|--------|--------|---------|
| Arizona<br>(June-July)<br>(October-November) | Steady | \$\$\$ | Good    |



## Mushroom

New government duties are expected to put upward pressure on pricing as demand continues to exceed available supplies.

| Commodity/Region | Supply | Price  | Quality   |
|------------------|--------|--------|-----------|
| Nationwide       | High   | \$\$\$ | Excellent |



## Onions

**ALERT**

Texas and Georgia onion seasons are winding down, with Central California and New Mexico supplying the remainder of the summer onion season. Freight continues to drive the market, while winter storage onions remain available from Washington.

| Commodity/Region                             | Supply | Price  | Quality   |
|----------------------------------------------|--------|--------|-----------|
| Eastern Orgeon/Parma, ID<br>(August - April) | High   | \$\$\$ | Excellent |
| San Joaquin Valley<br>(May - August)         | Light  | \$\$\$ | Good      |
| Tri-Cities, Washington<br>(July - April)     | High   | \$\$\$ | Good      |



## Pears

Sacramento Delta Bartletts have started, with improved volume expected next week. Washington Anjou supplies are winding down for most shippers, and even those expecting a seamless transition to new crop Bartletts are reporting light availability.

| Commodity/Region | Supply | Price  | Quality |
|------------------|--------|--------|---------|
|                  | Steady | \$\$\$ | Good    |

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Pineapples

**ALERT**

Costa Rica supplies remain steady through July. Mexico volumes are declining post-peak, keeping the market tight. Larger sizes are expected to improve by late July, while crownless and organic supplies remain limited.

| Commodity/Region           | Supply | Price  | Quality |
|----------------------------|--------|--------|---------|
| Costa Rica<br>(Year round) | Light  | \$\$\$ | Good    |



## Potatoes

**ALERT**

Large potato sizes are tightening as pack outs decline. Warm winter conditions have impacted storage, reducing availability. Lead time may be needed to secure product. Washington potatoes remain good quality, with mid sizes peaking. Florida colors are nearing the end, yellows remain tight, and sweet potato supplies from North Carolina are limited until new crop.

| Commodity/Region                    | Supply | Price  | Quality   |
|-------------------------------------|--------|--------|-----------|
| Idaho Falls, Idaho<br>(August-July) | Steady | \$\$\$ | Good      |
| Pasco, Washington<br>(August-July)  | Steady | \$\$\$ | Excellent |



## Squash

Steady supplies are available from multiple growing regions, including California, Baja, Washington, Michigan, Ohio, and New Jersey.

| Commodity/Region                       | Supply | Price  | Quality |
|----------------------------------------|--------|--------|---------|
| Mexico<br>(June - September)           | Steady | \$\$\$ | Good    |
| Ohio/MI/OH/NJ/NC<br>(June - September) | Steady | \$\$\$ | Good    |
| California<br>(May - October)          | Steady | \$\$\$ | Good    |



## Stone Fruit

California stone fruit is nearing full production. Peaches and nectarines are sizing up, with smaller sizes becoming limited. Pluots have started, with additional varieties expected soon. Washington cherry season continues but will begin tapering off in the coming weeks.

| Commodity/Region   | Supply | Price  | Quality |
|--------------------|--------|--------|---------|
| San Joaquin Valley | Steady | \$\$\$ | Good    |



## Tomatoes

Rounds and roma supplies are improving as Eastern production moves north. California production remains strong with good quality. Overall availability is increasing, with grape tomatoes still limited.

| Commodity/Region                              | Supply | Price  | Quality |
|-----------------------------------------------|--------|--------|---------|
| Mexico<br>(Year Round)                        | Steady | \$\$\$ | Good    |
| Baja California<br>(Spring/Summer - November) | Steady | \$\$\$ | Good    |
| California<br>(July - October)                | Light  | \$\$\$ | Good    |

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Weather Updates



## CALIFORNIA

High pressure will continue bringing above-average temperatures through the weekend. Coastal highs will remain in the 60s and 70s, with inland areas reaching the 80s to low 100s. The hottest days are expected Thursday and Friday.



## MEXICO

Isolated to scattered showers and thunderstorms are expected across Central Mexico fields through the weekend, with most areas receiving 0.05" to 0.30" of rainfall and locally higher totals possible. Temperatures will remain seasonably warm, with highs in the low 70s to low 80s and overnight lows in the mid 50s to low 60s through Sunday.



## FLORIDA

Warm and humid conditions will continue across the Florida Peninsula through July 12. Highs will remain in the low to mid 90s, with overnight lows in the low 70s to near 80. Isolated showers are expected, with winds generally below 20 mph through Friday.



## ARIZONA

High pressure will bring temperatures around 10 degrees above normal Wednesday and Thursday, with widespread highs near 110° and overnight lows in the upper 70s to mid 80s. Temperatures ease slightly Friday, but warm conditions continue through the weekend. Winds will increase from 15–20 mph Wednesday to 25–28 mph by Friday. Scattered thunderstorms in southeast Arizona may bring gusty outflow winds, with additional shower activity possible across central Arizona Saturday night and Yuma County by Sunday.

For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

# Freight Updates



We are seeing improvements in capacity this week from US growing regions as the 4<sup>th</sup> of July holiday is now passed. We look forward to the remaining summer months being active, yet more manageable.



## U.S. On-Highway Diesel Fuel Prices\*(dollars per gallon)

[full history](#) [XLS](#)

|                            | 06/22/26 | 06/29/26 | 07/06/26 | Change from |          |          |
|----------------------------|----------|----------|----------|-------------|----------|----------|
|                            |          |          |          | 2 year ago  | year ago | week ago |
| U.S.                       | 4.832    | 4.668    | 4.578    | ↑ 0.713     | ↑ 0.839  | ↓ -0.090 |
| East Coast (PADD1)         | 4.886    | 4.758    | 4.694    | ↑ 0.760     | ↑ 0.929  | ↓ -0.064 |
| New England (PADD1A)       | 5.371    | 5.248    | 5.220    | ↑ 1.119     | ↑ 1.253  | ↓ -0.028 |
| Central Atlantic (PADD1B)  | 5.368    | 5.190    | 5.146    | ↑ 1.059     | ↑ 1.210  | ↓ -0.044 |
| Lower Atlantic (PADD1C)    | 4.657    | 4.547    | 4.477    | ↑ 0.616     | ↑ 0.797  | ↓ -0.070 |
| Midwest (PADD2)            | 4.751    | 4.583    | 4.458    | ↑ 0.655     | ↑ 0.725  | ↓ -0.125 |
| Gulf Coast (PADD3)         | 4.415    | 4.283    | 4.225    | ↑ 0.627     | ↑ 0.842  | ↓ -0.058 |
| Rocky Mountain (PADD4)     | 4.795    | 4.602    | 4.484    | ↑ 0.694     | ↑ 0.818  | ↓ -0.118 |
| West Coast (PADD5)         | 5.809    | 5.528    | 5.425    | ↑ 0.971     | ↑ 0.963  | ↓ -0.103 |
| West Coast less California | 5.238    | 4.962    | 4.864    | ↑ 0.846     | ↑ 0.776  | ↓ -0.098 |
| California                 | 6.468    | 6.180    | 6.073    | ↑ 1.118     | ↑ 1.181  | ↓ -0.107 |

\*prices include all taxes

For more information: <https://www.eia.gov/petroleum/gasdiesel/>



# Crop Updates

## Holding for the Handoff

Melons remain in focus as the industry works through a rough handoff from the desert to the San Joaquin Valley. The Arizona-California desert season has wrapped up after insect pressure, worsened by a warm winter, reduced yields and forced an early finish. San Joaquin Valley production is underway, but the crop is not building fast enough yet to fully cover demand. Cooler weather this week may slow growth and stretch the supply gap a little longer, keeping markets elevated until new fields gain momentum.

Cantaloupe volume is slowly improving, and quality out of the San Joaquin Valley has been very good with strong internal color. Sizing is leaning large, with 9ct and jumbo 9ct fruit most available, while 15ct fruit remains very limited. Markets should begin to ease as volume improves, but relief will likely be gradual.

Honeydews remain more challenged. Mexico does not have enough fruit to backfill the domestic gap, the desert deal has finished, and San Joaquin Valley harvests are just getting started in a small way. Honeydews typically trail cantaloupes by five to seven days, and cooler temperatures may push production back even further. Overall honeydew volume is expected to be lighter than cantaloupe, with 5ct and 6ct fruit limited and 8ct slightly more available. Honeydews will remain the more difficult melon item in the short term.

Lemons remain elevated as District Two carries most of the domestic crop. District Two, the Ventura/Oxnard coastal region, typically grades heavier to choice fruit than fancy due to coastal wind exposure. Sizing is also part of the challenge and, like much of the fruit this season, is trending larger, leaning toward 95ct through 140ct. All sizes remain limited. Offshore fruit from Argentina and Chile is helping supplement supply, and Mexican shipments are also just getting started. While import programs should help fill some gaps that California cannot cover, overall availability remains limited and pricing is expected to stay firm.



# Crop Updates



Strawberries out of Salinas and Watsonville are steady. Cooler weather has helped quality and shelf life, but it has also slowed ripening and kept production from opening up. A warming trend into the weekend should help bring on more fruit, and open market availability may improve. Santa Maria has started with a small amount of new crop fruit, with more volume expected to build over the next couple of weeks.

Blueberry supplies are improving as the Pacific Northwest builds and Michigan gets started. The Pacific Northwest is entering peak production, with Oregon moving into its second full week and British Columbia beginning to pack. Overall supply should continue to improve week over week.

Blackberries and raspberries remain more active. Mexico is nearly finished on blackberries, and California is increasing slowly due to cooler weather. Pacific Northwest blackberries should begin later in July. Raspberries are also working through a transition, with Mexico declining and California gradually adding volume. Baja should help more later in July.

Melons are waiting on San Joaquin Valley volume, lemons are leaning on imports and grade flexibility, and berries are moving region by region. Lead time and sizing flexibility will make the biggest difference until these programs build into stronger supply.

