

# The Source

Commodity of the Month - Grapes / Melons / Pineapple

## MARKET ALERTS

**Avocados:** Mexico avocado supply is tight as harvest slows and growers hold fruit for higher prices. Demand exceeds supply until July, keeping prices volatile.

**Bell peppers:** Florida is nearly done, California is in a supply gap, and Georgia is below normal due to weather, keeping supply tight.

**Carrots:** Bakersfield leads supply with better baby carrot availability, while jumbo carrots stay tight but should improve.

**Citrus (Lemons):** Lemons are tight and expensive due to strong demand, with relief expected in July from imports; Ventura/Oxnard is the main source now.

**Citrus (Oranges):** Valencias are mostly large sizes, with small fruit very tight; flexibility and size substitution are needed.

**Cucumber:** Sonora is ending, Baja is ramping up, and Georgia remains tight due to weather, though markets may ease slightly soon.

**Eggplant:** Florida is ending, Georgia is ramping up, and Mexico/California off-grade supply is keeping markets elevated.

**Lettuce Leaf:** Romaine hearts and other leaf items are tight with strong demand, plus some quality issues.

**Onions:** Texas, Georgia, and desert production is ending; California and New Mexico now supply, with freight driving the market.

**Pineapple:** Pineapple supply is tight but stable through June, with improvement expected in larger sizes; some small and organic fruit remains limited.

## MAY 27, 2026

## CROP UPDATES

May is ending with continued supply gaps across key commodities as weather disease pressure and seasonal transitions limit availability. Lettuce remains tight especially romaine and green leaf due to reduced Salinas Valley yields while overall row crops stay uneven despite some improvement in broccoli and cauliflower. Lemons and avocados remain under pressure with tight supplies expected through June as domestic production declines and relief is not expected until July. Idaho potatoes are transitioning from Norkotahs to Burbanks impacting sizing and availability ahead of new crop in August. Overall June will require flexibility on size origin and variety as markets remain active and transitional across multiple categories. [Read more](#)

## WEATHER

**California:** A cut-off low keeps conditions cool with isolated showers through Thursday. High pressure returns Friday with a warming trend into the weekend, bringing inland highs into the mid 70s to low 90s.

**Mexico:** Isolated showers Wednesday, then mostly dry. Highs warm into the low 90s by the weekend with mild nights in the mid 50s to mid 60s.

**Arizona:** Warm with isolated showers through Friday, then slightly cooler and wetter this weekend. Florida highs mid 80s to mid 90s cooling to low to mid 80s, with lows in the 70s. Winds easing through the week.

**Florida:** Low deserts cool to below normal through Friday with highs in the 80s to low 90s, then warm back to around 100 by Sunday. Winds ease through the week.

## FREIGHT

Freight this week sees a decline in demand for trucks in CA, intersecting with summer-season decline of end user demand. Expect markets to stabilize in the coming days/weeks.



## IN PEAK SEASON

- Potatoes
- Blueberries
- Citrus (Oranges)
- Grapes

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# Commodity Updates



## Apples

The seasonal drawdown in inventories is expected to accelerate through June. While this tightening in supply will coincide with the typical seasonal slowdown in demand, price increases are expected to remain relatively modest. Reds and Golds are likely to experience the greatest impact, with Fujis and Pinks also beginning to tighten. Granny Smiths, however, remain in ample supply and are not expected to see a gap before new crop arrivals.

Commodity/Region	Supply	Price	Quality
Hudson, New York (September - June)	Steady	\$\$\$	Good



## Asparagus

Asparagus supply has improved significantly on the West Coast, with availability now outpacing demand as Mexican, domestic, Canadian, and Peruvian volumes all enter the market. Strong production from Mexico and seasonal domestic harvests are keeping supplies ample and freight rates lower. However, as West Coast, Midwest, and Canadian seasons begin to wind down through June, demand is expected to shift back toward Mexico and Peru, likely tightening supplies and strengthening the market heading into late June.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Light	\$\$\$	Fair
Peru (Year Round)	High	\$\$\$	Good
Mexico (November - May)	Light	\$\$\$	Fair



## Avocados

**ALERT**

Mexico's avocado market continues to tighten as the main crop season enters its final five weeks and grower participation slows. Many growers are holding back harvests in anticipation of stronger late-season pricing, driving field costs higher as packers compete for limited fruit. Current shipment projections from Mexico are expected to remain below U.S. demand, while California production continues to supplement supply but in limited volumes. Market volatility and elevated costs are expected to persist until Mexico's Flor Loca crop and additional Peruvian volume begin ramping up in July. Suppliers may require continued flexibility on sizing and Country of Origin substitutions to help maintain consistent supply.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Good
California (April - July)	Light	\$\$\$	Good



## Bell Peppers

**ALERT**

Florida production is essentially finished, with only limited off-grade product still available. California is experiencing a supply gap as the Coachella season winds down and Bakersfield production ramps up gradually. Meanwhile, Georgia volumes remain below normal due to recent weather impacts, keeping supplies tight and markets active.

Commodity/Region	Supply	Price	Quality
California (May - October)	Light	\$\$\$	Excellent
Georgia (May - June)	Light	\$\$\$	Good

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

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# Commodity Updates



## Berries (Blackberries)

Blackberry supplies remain plentiful out of CEMEX and California, with availability currently exceeding demand following the Memorial Day holiday slowdown.

Commodity/Region	Supply	Price	Quality
California (Year Round)	High	\$\$\$	Good



## Berries (Blueberries)

Product availability remains steady out of CEMEX, California, Georgia, and North Carolina, with demand holding at moderate levels. The Pacific Northwest season is expected to begin next week in Oregon and Washington, followed by Michigan production ramping up in mid-July.

Commodity/Region	Supply	Price	Quality
California (Year Round)	High	\$\$\$	Good
Dover, Florida (Year Round)	High	\$\$\$	Good
McAllen, Texas (Year Round)	High	\$\$\$	Good



## Berries (Raspberries)

Post-Memorial Day demand has softened, while increasing supplies from CEMEX and California continue to drive markets lower.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
McAllen (October - May)	Light	\$\$\$	Good



## Berries (Strawberries)

Salinas and Watsonville are expected to remain steady, with yields increasing into the weekend. Santa Maria production continues to trend lower due to seasonal planting declines. Across California, growing regions are still contending with unusually cold temperatures, a pattern expected to persist through the weekend.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Good

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

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**Driscoll's**  
Only the Finest Berries™



# Commodity Updates



## Broccoli

Broccoli supplies remain strong, with markets expected to ease gradually heading into the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	High	\$\$\$	Good
Salinas, California (May- October)	High	\$\$\$	Good



## Brussel Sprouts

Brussels sprout production is slightly limited but quality remains strong. The market is expected to hold steady with potential upward movement into next week.

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



## Carrots



The Bakersfield region is currently the primary source of supply, offering improved availability of baby carrots. Jumbo carrots remain somewhat tight due to smaller sizing, though conditions are expected to improve as the season progresses.

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



## Cauliflower

Cauliflower supplies remain strong, with good quality reported. The market is expected to hold steady into next week on solid availability.

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



## Celery

Overall, the market remains steady with continued production from the Oxnard and Santa Maria regions. While shippers are also loading in Salinas, transfer fees are typically applied and should be considered in pricing. Small sizes are currently less available compared to larger sizes, though overall quality remains above average.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	\$\$\$	Good

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

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# Commodity Updates



## Citrus (Grapefruit)

Star Ruby grapefruit are currently available, primarily peaking on 48ct, and are shipping out of 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 limited availability and sustained strong demand, with supplies expected to stay extremely tight through June, keeping prices firm. Relief is anticipated in July as increased offshore imports help supplement domestic supply. District Two (Ventura County/Oxnard region) is currently in full production and supplying the majority of fruit.

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



## Citrus (Limes)

The lime market remains stable, supported by softer demand and higher freight costs. Smaller sizes (230s and 200s) are most available, while larger fruit remains tight and more expensive. Supplies should hold through June, though quality may soften in hot, dry conditions. Peru and Colombia are exiting in early June, leaving Mexico as the primary summer supplier.

Commodity/Region	Supply	Price	Quality
Veracruz (Year Round)	Steady	\$\$\$	Good



## Citrus (Oranges)

**ALERT**

California Valencia oranges are heavily skewed to larger sizes, with peak volume on 56ct and 72ct fruit. Small sizes (113ct and 138ct) are very limited and expected to remain tight through the season. Flexibility on sizing will be needed, with substitutions into larger fruit likely. Suppliers are managing to contract averages, so encouraging 88ct or 72ct acceptance will help ensure coverage.

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



## Cucumber

**ALERT**

Sonora production is winding down while Baja volumes gradually increase heading into June. Georgia retail-size supplies remain tight due to inconsistent weather conditions. Markets are still elevated but may ease slightly later this week as production improves.

Commodity/Region	Supply	Price	Quality
Mexico (November - May)	Light	\$\$\$	Good
Baja California (May - October)	Light	\$\$\$	Good
Georgia (May - June)	Light	\$\$\$	Good

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

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# Commodity Updates



## Eggplant

**ALERT**

Florida's season is winding down with only limited pallet volume remaining. Georgia production has started light but is expected to improve significantly this week. Mexico and California are primarily shipping off-grade product, keeping markets elevated.

Commodity/Region	Supply	Price	Quality
California (May - October)	Steady	\$\$\$	Excellent
Georgia (May - June)	Light	\$\$\$	Good



## Garlic

The California garlic crop is progressing with strong quality, while Mexican supplies continue to supplement the California harvest.

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



## Grapes

South American imports are nearly finished, while Mexican grapes are crossing through Nogales in good volume. Mexican shippers are expected to remain aggressive on movement ahead of California's Central Valley season ramping up in mid-June. Limited domestic supplies remain from Coachella and are largely pre-committed, with Bakersfield and northern districts expected to bring the domestic season fully online and carry supply through at least late October, potentially into Thanksgiving.

### Grapes (Green)

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

### Grapes (Red)

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



## Green Onions

Green onion supplies remain strong overall and are expected to stay steady into next week, weather permitting.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good



## Kale

Kale supplies and quality remain solid, with conditions expected to hold steady into next week.

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

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

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# Commodity Updates



## Lettuce Iceberg

Production has slowed due to colder weather, rain, and INSV impacts across multiple shippers. While there is currently no escalation on lettuce items for value-added product, that is expected to change by the end of the week. Reported quality issues include light weights, outer leaf discoloration, pink ribbing, and misshapen heads.

Commodity/Region	Supply	Price	Quality
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Santa Maria, California (March-December)	Light	\$\$\$	Fair
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Salinas, California (May - October)	Light	\$\$\$	Fair
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## Lettuce Leaf

**ALERT**

Romaine hearts remain the tightest commodity on the row crop front, with demand continuing to exceed supply through the week. Green and red leaf, along with romaine, are also expected to stay limited. All leaf items are currently escalated for value-added product, with reported quality issues including tip and fringe burn as well as light weights.

Commodity/Region	Supply	Price	Quality
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Salinas, California (May - October)	Steady	\$\$\$	Fair
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## Lettuce Tender Leaf

Spinach and spring mix are in good supply for normal demand with solid quality, while arugula varieties are showing improvement this week.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Steady	\$\$\$	Good
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Oxnard, California (Year Round)	Steady	\$\$\$	Good
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Yuma, Arizona (November - May)	Steady	\$\$\$	Good
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## Melon (Cantaloupe)

Offshore cantaloupes will finish this week, with domestic melons now becoming the primary supply. Summer retail ads are expected to boost demand. Production will continue through the Brawley/Yuma region into July before transitioning to Central California. The Mexican season has ended.

Commodity/Region	Supply	Price	Quality
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Central America (December - May)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Melon (Honeydew)

Offshore honeydews are finished, while Mexican supplies remain strong in Arizona and domestic production continues in the Brawley/Yuma region. Summer retail ads are expected to increase demand.

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



## Melon (Watermelon)

Crossings out of Mexico have declined, pushing market prices higher. Domestic watermelons are available in limited volume from California and Florida.

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



## Mushroom

Excellent supplies and availability.

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



## Onions



Onion production from Texas, Georgia, and the California desert is winding down. Central California and New Mexico are now the primary loading regions for the remainder of the summer season. Freight costs are currently the main driver of the market.

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



## Pears

Anjou volume continues to tighten, though several major shippers do not expect to finish before Washington's new crop Bartletts begin in early August. The Bosc season is expected to conclude in about two weeks, while Red Anjous should finish by the end of June. California is set to begin new crop Bartletts in the final week of June.

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

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

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# Commodity Updates



## Pineapples

**ALERT**

The pineapple market remains stable, though supplies are still tight and expected to stay that way through May into June, with contract business prioritized. Larger sizes should gradually improve by mid-June. Crowned 6 and 7 count fruit is increasing in volume, while 8 count remains steady. Crownless 8 and 10 count fruit and organic pineapples continue to be limited.

Commodity/Region	Supply	Price	Quality
Costa Rica (Year round)	Light	\$\$\$	Good



## Potatoes

Supply is strong with steady demand, but Memorial Day shed closures require extra order lead time. The new Burnbank variety is peaking on smaller sizes. Washington potatoes are producing excellent quality with mid-size peaks, while large and small counts remain tight. Florida colored potatoes will continue for 3-4 weeks. Fuel costs are up about \$1 in some areas. Yellow potatoes are tight, reds are more available, and North Carolina sweet potatoes are limited until new crop.

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



## Squash

Production is increasing in California, Baja, and Georgia, though yellow squash remains the tightest item. Florida is nearing the end of its season, with weather impacting remaining supplies. Strong demand continues to keep squash markets firmer than usual across all regions.

Commodity/Region	Supply	Price	Quality
Mexico (June - September)	Light	\$\$\$	Good
Georgia (May - June)	Light	\$\$\$	Good
California (May - October)	Light	\$\$\$	Good



## Stone Fruit

California's Central Valley stone fruit season is ramping up quickly, with peaches, plums, and nectarines increasing in volume and improved varieties expected to come online into June. Chilean imported kiwi is in good supply, with prices beginning to ease. The California cherry season has wrapped up early, creating a brief gap before Washington begins limited shipments at the end of the week, with full production expected next week.

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



## Tomatoes

Tomato supplies are transitioning from Nogales to Baja as the primary production region, with Nogales winding down. Roma quality remains inconsistent, while larger fruit is more prevalent. Florida is finishing up and shifting to South Carolina, Quincy, and early California mature greens. Grape and cherry supplies remain tight due to reduced Florida volume and limited Baja production, keeping markets active through the transition.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Good
Florida (November - May)	Steady	\$\$\$	Good
Baja California (Spring/Summer - November)	Light	\$\$\$	Good

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

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# Weather Updates



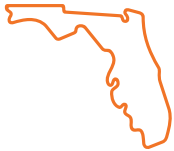
## CALIFORNIA

A cut-off low will remain over the area through Thursday, bringing isolated showers, patchy marine layer drizzle, and below-average temperatures. Morning lows will range from the upper 30s to low 50s, with daytime highs in the upper 50s to mid 60s near the coast and mid 60s to mid 70s inland. High pressure builds in on Friday, bringing a warming trend through the weekend with highs reaching the mid 70s to low 90s away from the coast.



## MEXICO

Isolated showers and a few thunderstorms are possible on Wednesday, with most rainfall totals ranging from 0.05" to 0.30", though higher amounts may occur in stronger storms. From Thursday through Sunday, shower activity will become widely isolated. Daytime highs will range from the mid 70s to mid 80s through Thursday, rising to the upper 70s to upper 80s on Friday, and reaching the low 80s to low 90s over the weekend. Overnight lows will remain in the mid 50s to mid 60s through the weekend.



## FLORIDA

Warm temperatures will continue through Friday with isolated to scattered showers and thunderstorms. Conditions turn slightly wetter and a bit cooler over the weekend as a low-pressure trough may move into the region. Winds will gust in the 20–30 mph range on Wednesday, easing to around 20 mph on Thursday and Friday across much of the state. Across the Florida peninsula, highs will remain in the mid 80s to mid 90s through Friday, then ease into the low to mid 80s over the weekend. Overnight lows will hold in the low to upper 70s through the weekend.



## ARIZONA

Temperatures across the low deserts will drop to around 10 degrees below normal starting Wednesday as an unseasonably deep upper-level trough stalls over the West Coast. Highs will only reach the mid 80s to low 90s across most valleys through Friday, with morning lows in the mid 50s to low 60s.

A warming trend returns this weekend, with highs climbing back into the low 100s by Sunday afternoon and overnight lows in the mid 60s. Westerly winds will gust 15–20 mph Wednesday afternoon and evening, easing slightly Thursday and Friday.

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

# Freight Updates



Freight this week sees a decline in demand for trucks in CA, intersecting with summer-season decline of end user demand. Expect markets to stabilize in the coming days/weeks.



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

[full history](#) XLS

	05/11/26	05/18/26	05/25/26	Change from		
				2 year ago	year ago	week ago
U.S.	5.639	5.596	5.523	↑ 1.765	↑ 2.036	↓ -0.073
East Coast (PADD1)	5.465	5.420	5.394	↑ 1.509	↑ 1.839	↓ -0.026
New England (PADD1A)	5.849	5.808	5.799	↑ 1.651	↑ 1.917	↓ -0.009
Central Atlantic (PADD1B)	5.863	5.819	5.810	↑ 1.687	↑ 2.009	↓ -0.009
Lower Atlantic (PADD1C)	5.278	5.231	5.201	↑ 1.431	↑ 1.773	↓ -0.030
Midwest (PADD2)	5.815	5.749	5.623	↑ 1.990	↑ 2.195	↓ -0.126
Gulf Coast (PADD3)	5.152	5.122	5.045	↑ 1.567	↑ 1.909	↓ -0.077
Rocky Mountain (PADD4)	5.491	5.549	5.493	↑ 1.787	↑ 2.048	↓ -0.056
West Coast (PADD5)	6.562	6.524	6.500	↑ 2.051	↑ 2.252	↓ -0.024
West Coast less California	5.905	5.920	5.909	↑ 1.927	↑ 2.146	↓ -0.011
California	7.321	7.222	7.182	↑ 2.197	↑ 2.374	↓ -0.040

\*prices include all taxes

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

# Crop Updates



## May Grey to June Gloom

As we close out May and move into June, several high-volume items are still working through supply gaps. Some markets are getting help from lighter school demand, but weather, disease pressure, and seasonal transitions continue to limit availability on key commodities. The biggest areas to watch this week are lettuce, lemons, potatoes, and avocados.

Row crops are mixed. Broccoli and cauliflower have improved after a difficult stretch, but lettuce has turned active again. Iceberg supplies are tightening as disease pressure increases in the Salinas Valley, with INSV, Sclerotinia, mildew, and internal burn reducing yields in current fields. Romaine remains extremely tight, and green leaf is still limited. Quality is generally good, but harvestable acreage is the issue. Mexico is moving into its lighter summer production window, while regional programs across the United States and Canada should begin adding volume through June. Until that volume builds, lettuce markets are expected to remain elevated.

Lemons remain one of the tighter citrus items. District One is past peak production and winding down, while District Two is now carrying most of the domestic crop. With fewer growers in the district and strong demand still in place, all sizes are tight, not just the smaller fruit. The market is expected to stay elevated through June. Offshore fruit should begin arriving late June into early July, but early arrivals will likely lean larger and may carry higher pricing before broader relief develops.



# Crop Updates



Idaho russet potatoes are in a seasonal variety transition. Norkotahs are winding down, and Burbanks are becoming the main storage variety until new crop begins. Burbanks typically have a smaller overall size profile, often peaking closer to 9Oct, and their shape can contribute to increased #2 availability compared to Norkotahs. New crop potatoes are in the ground now and are expected to become available in early August. Until then, the variety shift will affect both demand and pricing as customers adjust from Norkotahs into Burbanks.

Avocados remain the most volatile category heading into June. Mexico's main crop is in its final stretch, and fewer growers are actively harvesting. Some are slowing harvests to wait for stronger late-season pricing, which is creating a tighter supply environment and pushing field costs higher. California is helping support the market, but current production is not enough to offset the decline from Mexico. Relief is expected in July as Flora Loca and Peru begin adding volume, but the next several weeks will remain tight and cost-sensitive.

Lead time and flexibility on origin will be the biggest help in fulfilling orders as supply remains limited across these key categories. June will require close attention and flexibility on size, variety, and country of origin.

