

# The Source

Commodity of the Month - Grapes / Melons / Pineapple

## MARKET ALERTS

**Asparagus:** West Coast asparagus supplies remain limited due to light Mexican production, though added volume from Canada, Washington, Michigan, and Peru has eased markets slightly. Central Mexico is expected to improve within 7-10 days, but tighter conditions could return by mid-June.

**Avocados:** Mexico's avocado market continues to tighten as growers slow harvests ahead of higher late-season pricing. Limited supply and strong demand are expected to keep markets elevated until Peru and Flor Loca volumes increase in July.

**Bell peppers:** Bell pepper supplies remain limited as production transitions from Florida and Coachella to Georgia and Bakersfield. Light volume and a production gap are expected during the transition.

**Carrots:** The Imperial Valley carrot season is ending as Bakersfield production begins next week. Smaller sizing continues to keep supplies tight and markets elevated, though improving yields should support more consistent supply through June and into July.

**Citrus (Oranges):** Navels are mostly large (56-72ct) with very tight small sizes, requiring flexibility and substitutions through the Valencia transition.

**Citrus (Lemons):** The lemon market for 140ct and smaller fruit remains elevated due to limited supply and strong demand, with tight conditions expected through June. Imports and increased Mexican crossings later this summer should provide some relief.

**Cucumber:** Cucumber supplies remain tight as production transitions from Florida to Georgia. Georgia volume should improve within 7-10 days, while Baja production is gradually increasing as Nogales winds down.

**Lettuce Leaf:** Romaine and romaine hearts remain very tight, with demand exceeding supply. Leaf and butter lettuce are limited but more available. Value-added pricing is elevated, and overall leaf quality is fair.

## MAY 20, 2026

**Onions:** The PNW onion season has ended, while Texas will finish within the next week. California remains the primary supplier until New Mexico and Mexican onions arrive later this month, with freight continuing to drive the market.

**Pineapple:** Pineapple supplies remain tight through May, with contract business prioritized and crownless and organic fruit still limited. Minor port delays are possible ahead of Memorial Day.

**Squash:** Squash supplies remain somewhat limited as East Coast regions transition, though Baja and California production should improve availability within 7-10 days.

## WEATHER

**California:** Above-normal temperatures will continue through Friday before slight cooling arrives this weekend.

**Mexico:** Warm temperatures and isolated showers will continue into the weekend, with thunderstorms possible.

**Arizona:** A warming trend will push temperatures into the 90s and low 100s across Arizona and southeast California later this week.

**Florida:** Warm temperatures, isolated storms, and gusty winds will continue through the week across parts of Florida.

## CROP UPDATES

Produce markets remain active, with tight supplies and rising costs on avocados, small lemons, and strawberries. Avocado supplies from Mexico continue to tighten ahead of July relief from Peru and Flor Loca, while small lemons remain limited through June. Row crops are mixed but improving overall, though romaine and green leaf remain pressured by disease and reduced yields. Cool California weather continues to limit strawberry production, keeping supplies light and demand strong. Planning ahead and remaining flexible on sizing and origin will be important as markets stay tight. [Read more](#)

## FREIGHT

**PRO\*FRESH**  
LOGISTICS

Freight this week sees market decline from DOT Blitz last week, yet markets will remain active through Memorial weekend. Shipper delays are improving with warm weather along costal growing regions.

## IN PEAK SEASON

- Potatoes
- Citrus (Oranges)
- Grapes

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# Commodity Updates



## Apples

The seasonal drawdown in inventories is expected to accelerate through June, aligning with the typical seasonal slowdown in demand. As a result, only modest upward pressure on pricing is anticipated. Reds and Golds are expected to experience the greatest impact, while Fujis and Pinks are also beginning to tighten. Granny Smiths, however, remain in strong supply and are not expected to see gaps ahead of new crop arrivals.

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



## Asparagus



West Coast asparagus supplies remain limited due to lighter Mexican production, though increased volume from Canada, Washington, Michigan, and Peru has recently eased markets. Southern Baja is ramping up slower than expected and may decline by early June, while Central Mexico should improve over the next week to 10 days. Markets have softened with added supply, but relief is likely temporary. Domestic production will peak in early June and begin winding down by early June, which may shift demand back to imports and the West Coast. Overall, tighter conditions are expected to return by mid-to-late June into early July.

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



## Avocados



Mexico's avocado market continues to tighten as the main crop season enters its final seven weeks and grower participation steadily declines. Many growers are intentionally slowing harvest activity in anticipation of stronger late-season pricing, pushing field costs significantly higher as packers compete for limited fruit availability. Current shipment projections from Mexico are expected to fall short of overall U.S. demand, while California production is helping supplement supply but remains relatively limited. Looking ahead, the industry anticipates continued market volatility and upward pricing pressure until the Flor Loca crop and increased Peru volumes begin ramping up in July. Suppliers continue to closely monitor availability and may require ongoing flexibility with sizing and Country of Origin substitutions to help maintain consistent supply.

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



## Bell Peppers



Eastern bell pepper supplies remain limited as production transitions from Florida into Georgia. Nogales has completed for the season, while Coachella Valley production is winding down rapidly. The market is expected to experience a production gap as the industry transitions from the desert growing regions into Bakersfield. Supplies remain light, with shippers largely sold out through the week, and tighter availability is expected until Bakersfield volume begins to ramp up.

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)

Steady supplies continue to be available out of Central Mexico and California's Central Coast. Markets remain soft due to light demand, while overall quality has remained consistently good.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Steady	\$\$\$	Good
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## Berries (Blueberries)

Product is currently shipping from Central Mexico, California, and Georgia, with supplies remaining steady against moderate demand. The Pacific Northwest is expected to begin production in June, followed by Michigan production ramping up in July.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Steady	\$\$\$	Good
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Dover, Florida (Year Round)		\$\$\$	Good
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McAllen, Texas (Year Round)	Light	\$\$\$	Good
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## Berries (Raspberries)

Raspberry production remains steady out of Central Mexico and California, with markets continuing to soften due to stable supply and lighter demand.

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

Strawberry production is currently underway in Salinas/Watsonville and Santa Maria, while Oxnard is nearly finished for the season. Abnormally cool weather conditions have continued to suppress yields, keeping overall supplies limited as the industry moves beyond the Memorial Day demand pull. Production in Salinas and Watsonville is expected to gradually increase in the coming weeks, while Santa Maria volumes begin to decline. Current forecasts indicate the cooler weather pattern is expected to continue into next week, which may further slow the pace of production growth.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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



# Commodity Updates



## Broccoli

Broccoli supplies continue to improve, putting downward pressure on the overall market. Expect pricing to gradually ease further as the industry moves 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 remains slightly limited, though overall quality continues to be good. Markets are expected to remain steady in the near term, with the potential for upward pricing movement heading into next week.

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



## Carrots



The Imperial Valley carrot season is wrapping up, with Bakersfield spring production set to begin next week. Smaller sizing continues to limit supplies and support elevated markets for Jumbos, sticks, and chips. Weather delays earlier in the season extended desert production and slowed the transition. Field conditions and peeled yields are improving, with more consistent supplies expected through June. By July, volumes should return to more normal levels as Kern County production ramps up under better growing conditions.

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 have improved significantly, with good availability and quality reported. The market is expected to remain steady through next week.

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



## Celery

The market remains firm, with Southern California supplies running moderate to light and expected to stay tight through the rest of the week. Large sizing will have the best availability. Overall quality is expected to remain fair. Value-added items are anticipated to escalate throughout the week due to constrained supply conditions.

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 are available, peaking at 48ct and are shipped out of Riverside and the San Joaquin Valley.

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



## Citrus (Lemons)

**ALERT**

The lemon market for 140ct and smaller fruit remains elevated due to limited supply and strong demand, with tight conditions expected through June. Domestic production is centered in District Two, while small sizes remain extremely scarce. Offshore imports are expected in late June and July, mainly larger fruit, with Mexican crossings gradually increasing and providing some relief. Until then, pricing is expected to remain firm.

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



## Citrus (Limes)

Lime markets are firm on lower Mexican yields, with smaller sizes peaking, larger fruit scarce until June/July, and another price increase expected late June as Mexico takes over summer supply as offshore exits the market

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

**ALERT**

California Navel oranges are heavily skewed toward larger sizes, with 56ct and 72ct dominating while smaller sizes (113ct and 138ct) remain very limited and expected to stay tight through the end of the season and into the Valencia transition. Flexibility on sizing will be necessary, with substitutions into larger fruit likely as small sizes become harder to source. Suppliers will continue managing to contract size averages, and programs are encouraged to accept 88ct or 72ct where possible.

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

**ALERT**

Cucumber supplies remain tight as production transitions from Florida to Georgia. Georgia volumes are expected to improve over the next 7-10 days, while coastal North Carolina is anticipated to begin light harvests in early June. In the West, Nogales supplies are winding down as Baja gradually ramps up production, with overall quality remaining acceptable. Increased production from Baja is expected within the next two weeks.

Commodity/Region	Supply	Price	Quality
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Florida (November - May)	Light	\$\$\$	Good
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

Mexico and California eggplant supplies remain limited, with only off-grade product available to ship out of Nogales and McAllen. Volume in the California desert remains light, continuing to support elevated FOB pricing.

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



## Garlic

The California garlic crop is progressing with good quality, while Mexican supplies continue to complement 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 grape imports are expected to conclude by the end of May, while Mexican grapes have begun crossing through Nogales and should reach full production in June. Mexican shippers are expected to aggressively move volume ahead of California's Central Valley season, which begins in mid-June. Limited domestic grapes are currently available out of Coachella, though supplies remain heavily pre-committed and are not expected to significantly impact the market. Once production ramps up in Bakersfield and points north, the domestic grape season will be fully underway and is expected to carry through at least the end of October, and potentially beyond Thanksgiving.

### Grapes (Green)

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

### Grapes (Red)

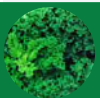
Commodity/Region	Supply	Price	Quality
Mexico (May - June)	High	\$\$\$	Good



## Green Onions

Green onion supplies remain strong overall, with steady availability expected to continue into next week, weather permitting.

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



## Kale

Kale supplies and quality remain mostly good. Look for more of the same going into next week.

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

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

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# Commodity Updates



## Lettuce Iceberg

Lettuce supplies have improved in both Salinas and Santa Maria, helping soften the market. Shippers are beginning to flex on volume orders, while escalation on value-added products is expected to continue through this week before easing next week. Reported quality issues include slight pink ribbing and misshapen heads, with carton weights averaging 36-41 pounds.

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



## Lettuce Leaf



Romaine and romaine heart supplies are expected to remain tight over the next few weeks as demand continues to exceed availability. Green leaf, red leaf, and butter lettuce supplies are also limited, though availability is expected to be better than romaine. Escalated pricing remains in effect on all value-added items, with overall quality reported as fair across the leaf category.

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



## Lettuce Tender Leaf

Spinach and spring mix supplies remain steady for normal business, with overall quality reported as good. Arugula quality is generally good as well, though some minor yellowing has been reported, typically limited to a few leaves per bag.

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



## Melon (Cantaloupe)

Offshore cantaloupes remain available in CA, TX, FL, and the Northeast, though the season is winding down as domestic production ramps up. Product will remain available from the Brawley/Yuma region through July before transitioning to Central California. Summer retail ads are expected to increase demand, while Mexican cantaloupes have finished for the season.

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

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

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# Commodity Updates



## Melon (Honeydew)

Offshore honeydews remain available in limited supply as the season winds down. Mexican honeydews continue shipping through Arizona, while domestic production is underway in Brawley/Yuma. Summer retail ads are expected to increase demand.

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



## Melon (Watermelon)

Watermelon crossings from Mexico have declined, continuing to push market prices higher. Limited domestic supplies are currently available 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



The PNW onion season has ended abruptly due to quality concerns tied to a warm winter. Texas onions are expected to finish within the next week, leaving California as the primary supply region as shippers focus on contracts and rebuilding inventory. New Mexico and Mexican onions are expected by the end of the month, while freight costs continue to drive the market.

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



## Pears

Anjou pear supplies continue to tighten, though several larger shippers expect to carry inventories through the start of Washington's new crop Bartlett season in early August. The Bosc season is expected to conclude within the next three weeks, while Red Anjous are projected to finish by the end of June. California is expected to begin harvesting new crop Bartletts during the last 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 continue to be tight through the end of May, with contract business receiving priority. Larger sizes are expected to improve later this month, while crownless and organic pineapples remain limited. Minor port delays are possible ahead of Memorial Day, so earlier check-ins are recommended.

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



## Potatoes

Potato supplies remain strong with solid demand, though sheds will operate limited hours over Memorial Day weekend and orders will require additional lead time. Washington potatoes continue to show strong quality, peaking on mid sizes, while large and smaller counts remain tight. Florida color potatoes are limited due to freeze impacts, with smaller sizing dominating supplies. Yellow potatoes remain tight, reds are more available, and North Carolina sweet potatoes will stay limited until new crop harvest begins. Freight and rising fuel costs continue to pressure the market.

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



## Squash

**ALERT**

Squash supplies remain steady but somewhat limited as East Coast production transitions between growing regions. Recent rainfall has impacted Georgia production, while Florida volumes continue to decline. Baja and California districts are helping supplement supply, with overall availability expected to improve within the next 7-10 days.

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 all increasing in volume as stronger varieties continue coming online heading into June. Imported Chilean kiwi remains in good supply, with pricing beginning to ease. Meanwhile, the California cherry season is winding down, and a short supply gap is possible before Washington cherries begin in early June.

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



## Tomatoes

Tomato availability continues to improve across all categories as Florida, Mexico, Baja, Georgia, and South Carolina ramp up early summer production. Round tomatoes remain the most stable with full sizing availability, while Roma supplies are tightening as the Ruskin and Palmetto regions wind down. Grape tomatoes remain steady overall, despite minor heat-related grading issues in Florida.

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

Strong high pressure brings above average temps to the region. Morning lows will be in the upper 30s to mid 50s. Daytime highs will be in the upper 60s to upper 70s near the coast with mid 80s to mid 90s. The high weakens Friday cooling temps, but staying slightly above average with max temps Saturday in the mid 60s to mid 80s.



## MEXICO

Warm temps and isolated showers into the weekend. Precipitation totals will range from 0.05" to 0.30" in most showers but higher totals are possible in some t-storms under the present weather regime. Highs in the upper 70s to upper 80s over most spots into the weekend but slightly cooler temps are possible where showers limit daytime heating. Lows in the mid 50s to mid 60s through Wednesday morning and low 50s to low 60s for Thursday through Saturday morning.



## FLORIDA

Warm temps with isolated showers and t-storms into the end of the week. Winds will gust in the 15 to 24 mph range through Wednesday over most of southeast Florida and the Tampa Bay area. Shower activity will be isolated into the end of the week. Over most of the state highs in the mid 80s to mid 90s into the end of the week. Lows in the upper 60s to upper 70s through Friday morning. Over most of the state highs in the mid 80s to mid 90s into the end of the week. Lows in the upper 60s to upper 70s through Friday morning.



## ARIZONA

A slow warming trend runs through the week under stagnant high-pressure and winds shifting southerly by Tuesday evening. Highs in the low-mid 90s most fields Tuesday warm to the mid 90s across southwest AZ by Thursday, upper 90s-104 in southeast California. Similar numbers expected Friday and Saturday. Morning lows in the 50s-low 60s Tuesday warm to the mid-upper 60s by Friday.

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

# Freight Updates



Freight this week sees market decline from DOT Blitz last week, yet markets will remain active through Memorial weekend. Shipper delays are improving with warm weather along costal growing regions.

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

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

	05/04/26	05/11/26	05/18/26	Change from		
				2 year ago	year ago	week ago
U.S.	5.640	5.639	5.596	↑ 1.807	↑ 2.060	↓ -0.043
East Coast (PADD1)	5.504	5.465	5.420	↑ 1.525	↑ 1.840	↓ -0.045
New England (PADD1A)	5.863	5.849	5.808	↑ 1.634	↑ 1.911	↓ -0.041
Central Atlantic (PADD1B)	5.873	5.863	5.819	↑ 1.705	↑ 2.031	↓ -0.044
Lower Atlantic (PADD1C)	5.331	5.278	5.231	↑ 1.446	↑ 1.762	↓ -0.047
Midwest (PADD2)	5.742	5.815	5.749	↑ 2.064	↑ 2.268	↓ -0.066
Gulf Coast (PADD3)	5.178	5.152	5.122	↑ 1.632	↑ 1.921	↓ -0.030
Rocky Mountain (PADD4)	5.517	5.491	5.549	↑ 1.803	↑ 2.037	↑ 0.058
West Coast (PADD5)	6.631	6.562	6.524	↑ 2.029	↑ 2.228	↓ -0.038
West Coast less California	6.000	5.905	5.920	↑ 1.908	↑ 2.092	↑ 0.015
California	7.360	7.321	7.222	↑ 2.173	↑ 2.387	↓ -0.099

\*prices include all taxes

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



# Crop Updates



## Guac and Roll: Markets Stay Active

As we move through the back half of May, the market remains active across several high-volume categories. Cooler coastal weather continues to limit strawberry harvest yields, while avocados and small lemons are facing tightening supply and rising costs. Row crop markets are mixed, with some items improving and others still under pressure from disease and reduced yields.

Avocados are entering a volatile stretch as Mexico's main crop moves into its final seven weeks. Active grower participation has declined, and many growers are delaying harvests in anticipation of stronger late-season pricing. Field costs have climbed quickly over the past two weeks as packers compete for limited fruit. APEAM estimates roughly 330 million pounds remain in Michoacán, with about 250 million pounds expected to ship to the U.S. That equates to approximately 36 million pounds per week, well below current U.S. consumption of more than 60 million pounds weekly. California is increasing but only contributing around 13-15 million pounds per week. Expect costs to continue trending higher until Flor Loca and Peru begin adding volume in July. Flexibility on size and country of origin will be important.

Small lemons remain extremely tight. The 140ct and smaller market is elevated due to limited availability and steady demand, with tight supplies expected to continue through June. District One is winding down, while District Two is carrying the majority of domestic supply. The overall size profile is still dominated by 95ct through 115ct fruit, leaving 140ct through 200ct limited. Offshore lemons are expected to begin shipping late June into early July, while Mexican crossings have started in a limited way and should increase over the next 3-4 weeks.



# Crop Updates



Row crop supply has improved overall, and temperate weather has helped keep quality strong. Lettuce and broccoli markets are easing, while romaine and green leaf remain active. Romaine continues to see pressure from INSV and high core, which are reducing yields. Green leaf supply is manageable with support from Mexico, but numbers are being watched closely. Broccoli and cauliflower have improved after a tough stretch, with better yields and quality. Celery remains tight, though Oxnard and Santa Maria supply is adequate for expected demand. Spinach, spring mix, and heritage items are in good shape, while arugula is still showing some residual yellowing and mildew pressure but generally remains within spec.

Strawberry supplies remain very light as cool, inconsistent weather continues across the California growing regions. Growers are seeing one or two clear days followed by several days of overcast skies and colder temperatures, limiting harvest yields. A cooling trend is expected again mid-week and will likely continue into next week. Demand remains strong, open market options are limited, and shippers are focusing on contracts and previous commitments. Advance orders are strongly recommended, with possible fill rates and loading delays expected again this week.

Overall, school demand winding down over the next few weeks should help take some pressure off the market, but it will not be enough to fully offset the limited supplies. Planning ahead will remain important, especially where open-market availability is limited.

