

# The Source

Commodity of the Month - Onions / Garlic

## MARKET ALERTS

**Avocados:** Mexico avocado supplies are tightening as the main crop winds down, with lower shipments and higher costs. Relief is expected in July when Peru and Flor Loca volumes increase.

**Blueberries:** Market is in a supply gap: Mexico has ended early, California is light, Southeast is finishing, and Northwest, New Jersey, and Michigan are just starting or not yet ramped up.

**Carrots:** Bakersfield leads baby carrot supply; jumbo carrots remain tight due to sizing but should improve gradually.

**Citrus (Lemons):** Lemons are tight with strong demand, keeping prices firm through June; relief expected in July with imports, while Ventura/Oxnard leads supply.

**Citrus (Oranges):** Valencias are mostly large sizes; small fruit is very tight, requiring flexibility and substitutions, with 72ct/88ct recommended options.

**Lettuce (iceberg):** Lettuce market is strengthening with low yields and quality issues; escalated pricing continues, with stabilization expected in coming weeks.

**Lettuce Leaf:** Romaine hearts are tight; leaf items have better supply but varying quality and pricing, with escalated pricing continuing.

**Melon (cantaloupe):** Offshore cantaloupes are done; domestic melons now lead, but California Desert whitefly issues are tightening yields and sizing.

**Onions:** Texas, Georgia, and desert onions are ending; Central California and New Mexico now supply the market, with freight driving prices.

**Pineapple:** Pineapple supply is tight but stable through June; larger sizes and some volumes improving, with contract business prioritized.

**Strawberries:** Demand is soft but supplies are up on warm weather; summer retail competition is slowing movement, with promotions active. Quality is good, though sustained warm nights may lead to softer fruit.

JUNE 17, 2026

## CROP UPDATES

Lettuce remains in a prolonged supply gap with historically tight iceberg, romaine, and hearts due to disease and weather stress, though romaine markets may be starting to ease slightly. Cantaloupes are also tight with reduced yields and limited sizing, while lemons stay firm but are approaching relief as imports arrive in July. Idaho potatoes are tightening from storage issues and reduced packouts, with ongoing concerns ahead of new crop in August. Overall, markets remain constrained, with gradual improvement expected in select commodities but continued need for flexibility and lead time. [Read more](#)

## WEATHER

**California:** High pressure keeps temps above average with coastal mid-60s to inland 90s, easing Thursday with cooler, near-normal conditions, then warming slightly again over the weekend.

**Mexico:** Isolated showers and storms expected in Central Mexico over the next five days with light to moderate rain; temps near to slightly below normal.

**Florida:** Warm with isolated showers and storms; highs upper 80s to mid-90s, lows 70s-80s, with gusty winds in Florida through Friday.

**Arizona:** Isolated mountain rain possible Wednesday, then drier and slightly cooler through the weekend with highs easing from the upper 100s to low 100s and gusty southerly winds.

## FREIGHT

Demand for truck capacity this week continues to be strong across the US growing regions. We encourage pre booking and advance preparation as delays at supplier level continue to be a challenge



## IN PEAK SEASON

- Citrus (Oranges)
- Potatoes
- Grapes
- Strawberries

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# Commodity Updates



## Apples

The apple market has apparently decided that June is no time for excitement. While most commodities are keeping buyers guessing, apples have settled into a comfortable groove. Golden Delicious supplies are beginning to wind down, though some shippers expect fruit to last through July. Red Delicious supplies are also tightening, but the market remains unfazed. Meanwhile, Gala and Granny Smith volumes have finally returned to levels not seen in months—a welcome development for buyers.

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



## Asparagus

The West Coast asparagus market remains well supplied as Mexican and Peruvian production continues to exceed demand while domestic and Canadian seasons wind down. Domestic supplies are entering their final weeks, and as production declines, the market is expected to gradually strengthen. Looking ahead, Peru is expected to provide steady supplies through late summer, though weather concerns and reduced acreage could create supply challenges later in the year.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Light	\$\$\$	Fair
Peru (Year Round)	High	\$\$\$	Good
Ohio/NC/MI/NJ (June - September)	Steady	\$\$\$	Fair



## Avocados



Mexico's avocado market continues to tighten as the main crop season enters its final weeks and grower participation declines. Many growers are slowing harvests in anticipation of stronger late-season pricing, pushing field costs higher as packers compete for limited supplies. Shipments from Mexico are projected to remain below U.S. demand, with California production providing some relief but not enough to fully bridge the gap. Market volatility and elevated costs are expected to persist until Peru and the Flor Loca crop begin contributing larger volumes in July. In the meantime, suppliers may require flexibility on sizing and country-of-origin substitutions to help maintain consistent availability.

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



## Bell Peppers

Eastern pepper production is transitioning, with Georgia volumes declining and North Carolina expected to begin harvest soon. California remains the primary Western supplier, with the best quality coming from newer Bakersfield fields. Overall supply is expected to remain adequate as production shifts into northern growing regions.

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

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

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# Commodity Updates



## Berries (Blackberries)

Central Mexico production remains lower, while California's Central Coast is beginning to see improved volumes following last week's warmer weather. Markets remain steady overall, with prices trending modestly higher across most shippers.

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

**ALERT**

The market remains in a significant planting gap following the early end of the Central Mexico season due to quality issues. Central California is producing only light volumes, while the Pacific Northwest is expected to begin harvesting later this week and gradually ramp up after next week. North Carolina and Georgia are nearing the end of their seasons and are also facing quality concerns. New Jersey is just starting to produce meaningful volumes, which should help support eastern markets, while Michigan is still approximately two weeks away from starting production.

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

Central Mexico volumes continue to decline, while California production is beginning to increase as warmer temperatures support improved harvests. Markets remain firm, with prices expected to trend higher heading into the weekend.

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



## Berries (Strawberries)

**ALERT**

Demand remains soft, but recent warm weather has significantly improved yields and increased available supplies. With schools out for the summer and other seasonal fruits gaining retail shelf space, strawberry movement has slowed, prompting some shippers to offer volume incentives to stimulate demand. Strawberries remain highly promotable, and overall quality has been strong across all growing regions. However, if overnight temperatures continue to stay above 60°F, softer fruit may become more common in the coming weeks.

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 remain plentiful, and the market is expected to stay steady as we move 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, though overall quality remains good. The market is expected to stay steady with a potential uptick 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 Bakersfield region is currently the primary source for baby carrots, with improved availability. Jumbo carrots remain tighter due to smaller sizing, though conditions are expected to improve gradually 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 available. The market is expected to stay steady into next week amid continued ample 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

Production remains steady across all sizes, with 24-count being the most readily available. All escalations on value-added items have been removed. Harvesting will continue out of the Santa Maria/Oxnard region, and with no rain in the forecast, supplies are expected to remain steady throughout the week. Overall quality is expected to remain strong with most shippers.

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, with peak sizing in 48-count, 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 steady strong demand. Supplies are expected to stay extremely tight through June, keeping pricing firm in the near term, with relief anticipated in July as offshore imports increase. District Two (Ventura County/Oxnard region) is 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)

Lime prices continue to soften, though summer demand is expected to help stabilize the market in the coming weeks. Small sizes remain abundant and under the most pricing pressure, while larger fruit is more limited and continues to command premium pricing. Mexico will be the primary summer supplier, with weather and upcoming rainfall closely monitored for potential impacts on quality, sizing, and harvest activity.

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



## Citrus (Oranges)

**ALERT**

The California Valencia orange crop is heavily weighted toward larger sizes, with peak production in 56ct and 72ct fruit. Small sizes (113ct and 138ct) are extremely limited and expected to remain tight for the remainder of the season. To maintain consistent order coverage, flexibility on size and grade will be necessary, with substitutions into larger Valencias likely as small fruit becomes harder to source. Suppliers will continue to hold to contract size averages while managing overall supply, and customers are encouraged to consider 88ct or 72ct options, particularly school and DOD programs.

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



## Cucumber

Eastern supply remains steady, with strong production out of Georgia and North Carolina and solid quality and yields. Georgia is expected to remain active for another 2-3 weeks before volumes begin to seasonally decline. Meanwhile, Baja production is ramping up and is expected to become the primary Western source through most of the summer.

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

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

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# Commodity Updates



## Eggplant

Florida has finished, while Georgia supplies continue to build and are expected to improve over the next two weeks. Mexico and California remain extremely short with very limited availability. Markets are active but are expected to ease slightly as Georgia volume increases, creating potential promotional opportunities next week.

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



## Garlic

Mexican peeled garlic shipments will begin on Monday, 6/22/26, and will continue through the transition to the new California crop in late July to early August.

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



## Grapes

The Mexican deal in Nogales is nearly finished, with only limited inventory remaining as the transition to California begins. Red seedless production has started in the Central Valley and is expected to ramp up quickly over the next couple of weeks. The market is currently sharply higher compared to the end of the Mexican deal, but is expected to adjust as California volumes increase. Some California green varieties are also expected to begin later this week.

### Grapes (Green)

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

### Grapes (Red)

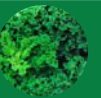
Commodity/Region	Supply	Price	Quality
Mexico (May - June)	High	\$\$\$	Good



## Green Onions

Green onion supplies remain strong overall, with availability 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 mostly good, with conditions expected to stay consistent 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

**ALERT**

This market continues to strengthen. Escalated pricing on all value-added lettuce items will remain in effect throughout the week, as yields continue to run below normal across multiple suppliers. INSV and erratic weather conditions are contributing to issues such as misshapen heads, lighter weights, and some pink ribbing. The market is expected to stabilize over the next few weeks.

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



## Lettuce Leaf

**ALERT**

Romaine hearts remain limited, while romaine and both green and red leaf have seen improved availability overall. Leaf items are expected to soften through the week, though conditions vary by shipper, resulting in wider price gaps in the market. Reported quality issues include lighter weights, tip burn, and fringe burn. Escalated pricing on all value-added leaf items will continue at a minimum through this week.

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



## Lettuce Tender Leaf

Spinach and spring mix are in good supply for normal business, with solid overall quality. Arugula varieties are also showing improvement this week.

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



## Melon (Cantaloupe)

**ALERT**

Offshore cantaloupes are finished for the season, with domestic melons now the primary supply. California Desert growers are currently dealing with whitefly pressure, which is impacting yields and sizing, particularly on larger fruit. Flexibility on sizing will be necessary, and these challenges are expected to persist through the remainder of June.

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

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



## Melon (Watermelon)

Crossings from Mexico have declined, putting upward pressure on market prices. Domestic watermelons are available in limited supply from California and Florida.

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



## Mushroom

New government duties are expected to drive higher prices, as demand continues to outpace available supplies.

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



## Onions



Onions from Texas, Georgia, and the California desert regions are coming to an end, with Central California and New Mexico now supplying the remainder of the summer season. Freight costs are currently the primary driver of 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

The pear market is entering its typical seasonal phase as Anjou inventories gradually decline, with supplies expected to tighten further through June and prices edging up accordingly. New-crop California Bartletts are anticipated to arrive in late June or early July, weather permitting, which should help ease pressure on remaining Washington supplies. Washington Bosc pears are finished for the season, and Red Anjous are nearly gone, with only limited inventories still available.

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 tight and expected to stay that way through the end of June, with contract business prioritized. Larger sizes should gradually improve later in the month. Crowned 6- and 7-count fruit is increasing, 8-count remains steady, while crownless 8- and 10-count and organic pineapples remain limited.

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



## Potatoes

Large size potatoes are beginning to tighten as packouts decline later in the season. A warmer winter has impacted storage, with some potatoes deemed unrunable, further reducing available supply. Lead time will be needed to secure product. Washington potatoes are showing strong quality and are peaking on mid sizes, while larger and smaller counts remain snug. Florida colored potatoes will be available for another one to two weeks. Yellow potatoes are tight, while reds are in a better position. North Carolina sweet potatoes remain limited until new crop becomes available.

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



## Squash

Good supplies are available on both coasts, with multiple regions currently in production, including Santa Maria, Fresno, Baja, Georgia, and New Jersey.

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



## Stone Fruit

California stone fruit is entering full production, running about two weeks early, with improved peaches, plums, and nectarines now available. Apricots are finished, while pluots have begun with additional varieties expected soon. Washington cherries are ramping up quickly, with the market adjusting lower as volume increases. It will be a short season, so ordering early is recommended.

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



## Tomatoes

Tomato supplies are improving as additional growing regions come into production. Roma volumes are building from North Florida, Georgia, California, and Arkansas, though smaller sizes will remain limited in the near term. Grape tomatoes are expected to stay firm on strong demand and reduced Southeast supply as larger growers finish up, while cherry tomatoes remain tight, particularly out of Baja. Canadian greenhouse production is steady with very good quality. Overall, Roma availability is improving, while grape and cherry markets remain snug.

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

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

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# Weather Updates



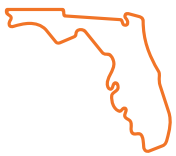
## CALIFORNIA

High pressure continues to bring above-average temperatures, with morning lows in the mid-40s to upper 50s and daytime highs ranging from the mid-60s along the coast to the upper 70s and low 90s inland. The ridge weakens Thursday, allowing the marine layer to deepen and temperatures to cool closer to seasonal averages through the end of the week, with highs in the mid-60s to low 80s. High pressure then rebuilds over the weekend, bringing a slight warm-up.



## MEXICO

Isolated to scattered showers and thunderstorms are expected over the next five days, with most rainfall totals ranging from 0.05” to 0.30”, though some storms could produce 0.50” or more. Temperatures will run near to slightly below normal through the weekend, with highs in the low 70s to low 80s and lows in the upper 50s to mid 60s across the Central Mexico growing regions.



## FLORIDA

Over the next five days, warm temperatures are expected with isolated showers and thunderstorms. Highs will range from the upper 80s to mid-90s through the weekend, with lows in the low 70s to low 80s through Sunday. Winds will gust between 15 and 23 mph through Friday across much of southeast Florida and the Tampa Bay area.



## ARIZONA

Isolated rain may continue over higher elevations on Wednesday, but otherwise a drying and slight cooling trend is expected through the weekend. Highs will ease from the mid-to-upper 100s in the valleys Wednesday to the low-to-mid 100s by Saturday and Sunday. Morning lows will cool from the mid-70s to around 80 on Wednesday into the upper 60s to low 70s by Saturday. Southerly winds will persist, with afternoon gusts around 15–20 mph.

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

# Freight Updates



Demand for truck capacity this week continues to be strong across the US growing regions. We encourage pre booking and advance preparation as delays at supplier level continue to be a challenge



## U.S. On-Highway Diesel Fuel Prices\*(dollars per gallon) [full history](#) [XLS](#)

	06/01/26	06/08/26	06/15/26	Change from		
				2 year ago	year ago	week ago
U.S.	5.350	5.210	5.059	↑ 1.324	↑ 1.488	↓ -0.151
East Coast (PADD1)	5.237	5.149	5.048	↑ 1.214	↑ 1.427	↓ -0.101
New England (PADD1A)	5.731	5.626	5.508	↑ 1.423	↑ 1.613	↓ -0.118
Central Atlantic (PADD1B)	5.694	5.568	5.503	↑ 1.453	↑ 1.721	↓ -0.065
Lower Atlantic (PADD1C)	5.016	4.943	4.831	↑ 1.104	↑ 1.299	↓ -0.112
Midwest (PADD2)	5.392	5.182	5.011	↑ 1.390	↑ 1.474	↓ -0.171
Gulf Coast (PADD3)	4.900	4.786	4.646	↑ 1.174	↑ 1.434	↓ -0.140
Rocky Mountain (PADD4)	5.331	5.200	5.019	↑ 1.337	↑ 1.471	↓ -0.181
West Coast (PADD5)	6.398	6.289	6.074	↑ 1.657	↑ 1.764	↓ -0.215
West Coast less California	5.832	5.725	5.519	↑ 1.535	↑ 1.617	↓ -0.206
California	7.051	6.940	6.713	↑ 1.798	↑ 1.932	↓ -0.227

\*prices include all taxes

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

# Crop Updates



## Hearts Tight, Melons Light, Lemons in Sight

The lettuce market remains one of the most challenging supply situations the industry has seen in years. Iceberg, romaine, and romaine hearts have all been under pressure for an extended stretch, with historically elevated markets lasting longer than normal. Harvestable yields across the Salinas Valley continue to be impacted by soil-borne disease, INSV pressure, and weather-related stress, which has reduced field productivity and kept carton availability below normal.

While supplies remain tight across all lettuce categories, there are signs that romaine and romaine hearts have reached the peak of the market. We expect these markets to begin a gradual correction over the coming weeks as supplies slowly improve. Romaine and romaine hearts remains limited, but some production is beginning to improve, which has created some downward movement in pricing. Even with these early signs of relief, demand continues to exceed available supply across much of the industry, and spot opportunities can still be difficult to secure.

The cantaloupe market is moving through a major supply gap. The Yuma season started early due to above-normal temperatures during the growing cycle, but those same conditions allowed whitefly and virus pressure to build and spread through later fields. As a result, late acreage has seen lower yields, weaker plants, and a much smaller size profile. Jumbo fruit is essentially unavailable, 9ct fruit is extremely limited, and most of the remaining production is leaning toward 12s and 15s. Yuma is finishing earlier than expected, and California production is not expected to bring meaningful relief until early July. Lead time and size flexibility will be key to securing fruit.



# Crop Updates



Lemons remain elevated, but we are getting closer to relief as imports begin arriving in early July. District One has wrapped up, and District Two is carrying the bulk of domestic production. With fewer growers in the district and strong demand still in place, all sizes remain tight, not just small fruit. Markets are expected to stay firm through the balance of June. Offshore lemons should help supplement domestic supply as we move into July, though early arrivals will likely lean toward larger fruit and carry strong pricing before broader relief develops.

Idaho russet potato supplies are tightening as storage quality becomes more of a concern. An unusually warm winter in Idaho has accelerated quality issues in storage, including pressure bruising, and pack-outs are declining faster than expected. This has reduced the amount of shippable product and is putting pressure on larger sizes in particular. Keeping inventories tight and turning product every one to two weeks will be important until new crop becomes available.

Looking ahead, new crop potatoes are expected around early August, but there are concerns beyond the current storage season. Some acreage may shift into alternative crops, and Idaho water shortages could impact yields for the next years crop.

We are starting to see some signs of relief in select areas, but availability remains far from normal. Lead time, tighter inventory management, and flexibility on sizing and substitutions will be the biggest help in keeping orders covered as the industry works through these supply gaps.

