

The Source

Commodity of the Month - Onions / Garlic

MARKET ALERTS

Asparagus: Asparagus is firming as Mexico leads supply with tight large sizes, while heat may limit Southern Baja and Peru, domestic, and Canadian seasons wind down, keeping upward pressure on prices.

Bell Peppers: Bell pepper supplies are tightening as Georgia and Bakersfield finish early, with limited availability until new production ramps up in the Carolinas, Fresno, and Oxnard. Quality issues from heat and rain are also limiting promotional opportunities.

Citrus (Lemons): Lemons remain tight and elevated through June, with relief expected in July as imports increase; Ventura/Oxnard is the main source.

Melon (cantaloupe): Offshore cantaloupes are done, and domestic supply is tight due to desert shutdowns and delayed CA production, creating a gap through 7/6 with prorated contracts and sizing subs.

Melon (honeydew): Offshore and Mexican honeydews are done, leaving tight domestic supply due to desert shutdowns and CA delays, with prorated contracts and shortages expected through 7/6.

Melon (watermelon): Lower Mexico crossings are raising prices, with limited domestic supply and weather delays in GA/FL tightening the watermelon market.

Pineapple: Pineapples are improving but still tight, with steady Costa Rican supply, rising large sizes, and limited crownless/organic; fees still under review.

JUNE 24, 2026

CROP UPDATES

Lettuce markets are easing as California production improves, bringing better availability and lighter pricing, though some quality issues remain. Melons remain tight due to early desert season shutdowns and whitefly pressure, with limited cantaloupe and honeydew supply until Central California and Westside production builds around early July. Avocados are improving with Mexico's Flor Loca crop arriving, while strawberries are steady with good production and blueberries and raspberries remain tight due to uneven regional supply. Overall, lettuce is easing, melons are the main constraint, and most other items are in transition with gradual improvement expected. [Read more](#)

WEATHER

California: High pressure keeps temps warm through midweek, then cooling begins Friday with a stronger marine layer and highs easing into the upper 60s-80s next week.

Florida: Warm, humid Florida weather with scattered storms, highs in the upper 80s-mid 90s, lows 70s-80s, and gusty winds through Friday.

Mexico: Central Mexico sees scattered weekend storms with light rain, seasonable temps, highs in the 70s-80s and lows in the 50s-60s through June 28.

Arizona: Extreme heat midweek (110s) in deserts, then cooling into the 90s-100s by Sunday with gusty winds Thu-Fri.

FREIGHT

Freight markets continue to be strong across the country with demand for capacity in Georgia peaking due to summer new crop items. Shipper delays out west caused by weather related issues persists and we expect multi-day loading to continue. We do not anticipate a lull in the market going into the 4th of July.



IN PEAK SEASON

- Carrots
- Citrus (Oranges)
- Grapes
- Strawberries

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Commodity Updates



Apples

The Red and Gold Delicious markets have finally begun responding to their tightening inventories. While the changes have been modest, even a slight increase is more movement than we've seen in weeks. Meanwhile, Gala and Granny Smith apples continue to be readily available with supplies remaining strong.

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



Asparagus

ALERT

The West Coast asparagus market is strengthening as Mexico becomes the primary supplier, with larger sizes already tight and smaller sizes beginning to firm. While heat is expected to impact Southern Baja production, increasing harvests in Central and Northern Mexico should help support supply into the fall. Peruvian supplies remain limited due to lower yields and strong global demand, while domestic and Canadian seasons are ending, shifting demand back to Mexico and Peru and likely putting additional upward pressure on prices in the weeks ahead.

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



Avocados

Avocado markets are beginning to level out, with pricing easing compared to the past few weeks and additional relief possible as Flora Loca volumes increase. Current Negra fruit continues to eat very well with strong oil content but is ripening quickly, while the early Flora Loca crop is starting slowly and taking longer to ripen. California production remains active, and Peru is expected to ramp up in late June and early July, providing additional supply to the market.

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



Bell Peppers

ALERT

The bell pepper market remains active as Georgia production winds down earlier than expected and Bakersfield enters its final stages. Supplies are tightening, with limited availability expected until production increases in the Carolinas, Fresno, and Oxnard over the coming weeks. Quality concerns persist due to recent heat and rainfall, making bell peppers a challenging promotional item in the near term.

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

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

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Commodity Updates



Berries (Blackberries)

Supplies remain light but steady from Central Mexico, while California production is expected to begin building during the first week of July, providing additional volume and helping improve overall market availability.

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



Berries (Blueberries)

The Pacific Northwest season has started on schedule with light volumes and is expected to build steadily through July. Supplies from New Jersey and Michigan remain limited, with weather impacting early production. Markets are expected to stay firm over the next few weeks until these growing regions gain momentum and yields begin to increase.

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



Berries (Raspberries)

Central Mexico volumes continue to decline, while California is beginning to contribute light production. Additional supplies from Baja are expected to come online in early July, helping improve overall availability.

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



Berries (Strawberries)

The overproduction seen last week has eased, bringing supplies into a more manageable balance out of Watsonville and Salinas. While availability remains strong, Santa Maria's old crop is nearly finished, and some shippers expect conventional new-crop fruit to begin shortly after the Fourth of July holiday.

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

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

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Driscoll's
Only the Finest Berries™



Commodity Updates



Broccoli

Broccoli supplies remain strong, and the market is expected to stay steady through the weekend with ample availability.

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, with the market expected to stay steady and potentially firm 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, with good availability across all carrot sizes.

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 decent this week, with the market expected to begin firming heading into 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 is steady with all sizes readily available, and some suppliers are flexible on larger volume orders, making this a good commodity to promote. There is currently no escalation on value-added items. Production continues out of the Santa Maria and Oxnard regions and is expected to remain steady throughout the week, with no major quality concerns reported.

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, peaking on 48ct fruit and shipping 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 remains elevated due to limited availability and strong demand, with supplies expected to stay extremely tight through June and pricing holding firm. Relief should begin in July as offshore imports increase and supplement domestic volume. District Two (Ventura County/Oxnard region) is currently in full production and supplying the majority of fruit.

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 prices remain low overall, especially on smaller sizes, while larger fruit is limited and continues to command a premium. Supplies are heavily weighted toward 200s and 230s, with some improvement expected in 175-count availability. Rain in Mexico may help improve sizing but could also disrupt harvests and tighten supply, with Mexico expected to dominate summer volume as Peru and Colombia seasonally wind down.

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

The California Valencia crop is heavily skewed toward larger sizes, with peak production on 56ct and 72ct fruit, while smaller sizes like 113ct and 138ct remain extremely limited and are expected to stay tight through the remainder of the season. Flexibility on size and grade will be needed to maintain order coverage, with substitutions to larger fruit likely as small sizes tighten. Suppliers will continue holding to contract size averages while managing overall supply, and schools and DOD programs should be encouraged to consider 88ct or 72ct fruit where possible.

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

The cucumber market remains stable, supported by rising production from Baja and mainland Mexico. However, supplies are expected to tighten as Georgia and Eastern North Carolina wind down their seasons, with excessive rainfall driving quality issues and prompting some early harvests to end. Western North Carolina, New Jersey, New York, and Baja Mexico are expected to help bridge supply gaps through the summer.

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

Eggplant supplies remain abundant on the East Coast, supported by strong production and good quality out of Georgia. A smooth transition into North Carolina and South Carolina is expected to maintain adequate availability. While California production is improving, prices there remain well above Eastern markets, making eggplant a strong promotional opportunity in the East.

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



Garlic

Shipments will transition to Mexican peeled garlic beginning with orders shipping on June 22, 2026, and will remain on Mexican product until the new California crop becomes available 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 grape season has transitioned to California, with red grapes in good supply and volumes continuing to increase. Green grapes are about a week behind but are following a similar trend. Expect markets to ease in the coming weeks as availability and quality continue to improve.

Grapes (Green)

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

Grapes (Red)

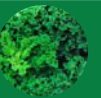
Commodity/Region	Supply	Price	Quality
Mexico (May - June)	Steady	\$\$\$	Good



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 (Year Round)	Steady	\$\$\$	Good



Kale

Kale supplies and quality remain mostly good, with conditions expected to stay 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 picked up with some shippers while others remain light, creating a gap in pricing across the industry. Escalation on value-added items is expected to continue throughout the week. With schools out of session nationwide and no rain in the forecast, supplies are expected to increase. Some quality defects are being reported, including misshapen heads, pink ribbing, and lighter weights.

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



Lettuce Leaf

Romaine along with green and red leaf has shown improved production to start the week, and this trend is expected to continue. Romaine hearts are also seeing better availability with some suppliers, though others are still experiencing tighter supplies. Escalation on value-added leaf items will continue throughout the week. Reported quality issues include smaller lengths, lighter weights, and light tip and fringe burn.

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 quality, and arugula varieties are also looking good 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 have finished for the season, leaving domestic melons as the primary supply; however, the market is currently challenged due to early shutdowns in the California desert from whitefly pressure and delays in the Central California region coming online. This has created a temporary supply gap in cantaloupes expected to last through the week of 7/6. Contract orders remain priority but are being prorated with sizing substitutions as needed.

Commodity/Region	Supply	Price	Quality
Central America (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 supply as the primary source. Production is currently tight due to early desert shutdowns from whitefly and delays in Central California, creating a temporary shortage. Contracts remain priority but are being prorated with sizing substitutions, and the situation is expected to last through the week of 7/6.

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



Melon (Watermelon)

ALERT

Crossings from Mexico have declined, pushing market prices higher. Domestic watermelons are available but in limited supply, while rain in Georgia and Florida has delayed production and increased demand ahead of the holiday.

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



Mushroom

New government duties are expected to drive price increases as demand continues to outpace available supplies.

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



Onions

Texas and Georgia onion seasons are winding down, with Central California and New Mexico now supplying the market for the remainder of the summer. Freight is currently a key driver of pricing. Winter-over onions are also available from Washington.

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 Washington Anjou deal is nearing completion for most shippers, with even those expecting a seamless transition to new-crop Bartletts reporting light supplies. Sacramento Delta Bartletts are expected to begin around July 1, with volume increasing quickly the week of July 6.

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

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

Supply Partners



Commodity Updates



Pineapples

ALERT

The pineapple market has improved, with steady Costa Rican supply expected through June. While overall availability remains tight and contracts are prioritized, larger sizes should improve toward month-end. Crowned 6 and 7 count volume is increasing, 8 count is steady, and crownless and organic fruit remain limited. Bunker fees are still being reviewed.

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



Potatoes

Large potatoes are tightening as packouts decline deeper into the season due to a warm winter impacting storage and reducing runability. Orders will require additional lead time to secure supply. Washington potatoes are peaking on mid sizes with large and small counts remaining tight, while Florida color potatoes will continue for another week or two. Yellow potatoes are tight, reds are in better position, and North Carolina sweet potatoes will remain limited until new crop availability.

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



Squash

Squash supplies are shifting out of Georgia as heavy rain and seasonal declines reduce production. Western North Carolina and New Jersey are providing strong volume and good quality, helping stabilize overall availability. Yellow squash remains the tightest item, with ongoing quality concerns in California and Baja impacting supply.

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



Stone Fruit

California stone fruit is now in near full production, running about two weeks early with improved peach, plum, and nectarine varieties coming in. Pluots have begun with additional premium varieties expected in the coming weeks. Washington cherry season is in full swing, with the market stabilizing at steady to slightly higher pricing. It remains a short season, so Northwest cherries will move quickly. Order early and often.

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



Tomatoes

The tomato market is mostly stable for cherries, rounds, and Romas, while grape tomatoes remain very tight with elevated pricing. Supplies are coming from Georgia, South Carolina, and California, with early North Carolina arrivals this week helping improve availability. Mexican production from Baja and Central Mexico is also contributing to overall supply.

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

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

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FRESH LINK



Weather Updates



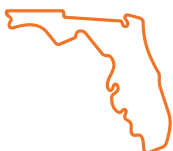
CALIFORNIA

Strong high pressure will continue to bring near to slightly above average temperatures along the coast and above average inland temperatures through midweek. Morning lows will range from the mid-40s to mid-50s, with daytime highs in the mid to upper 60s near the coast and the mid-70s to mid-90s inland. The high begins to weaken on Friday, allowing the marine layer to deepen and bringing a steady cooling trend inland through next week, with weekend highs expected to range from the upper 60s to upper 80s.



MEXICO

Isolated to scattered showers and thunderstorms are expected through the weekend across Central Mexico, with most areas receiving 0.05” to 0.30” of rain, though higher totals are possible in stronger storms. Temperatures will remain seasonably warm through June 28, with highs in the low 70s to low 80s and morning lows in the mid-50s to low 60s through Sunday.



FLORIDA

Warm temperatures with isolated showers and thunderstorms are expected through the weekend. Highs will range from the upper 80s to mid 90s across the Florida peninsula from Wednesday through Sunday, with overnight lows in the low 70s to low 80s. Winds will gust between 15 and 20 mph through Friday across much of southeast Florida and the Tampa Bay area.



ARIZONA

Warmest temperatures are expected Wednesday and Thursday, with widespread highs in the low to mid 110s across the low deserts. A gradual cooling trend begins Friday, with highs easing into the mid-90s to low 100s by Sunday afternoon. Morning lows will range from the mid-70s to low 80s in most valleys midweek, cooling to the low to mid-70s by Sunday. Light southerly winds Wednesday will shift and increase, with westerly gusts reaching 20–25 mph Thursday afternoon and again on Friday.

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

Freight Updates



Freight markets continue to be strong across the country with demand for capacity in Georgia peaking due to summer new crop items. Shipper delays out west caused by weather related issues persists and we expect multi-day loading to continue. We do not anticipate a lull in the market going into the 4th of July.



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

[full history](#) XLS

	06/08/26	06/15/26	06/22/26	Change from		
				2 year ago	year ago	week ago
U.S.	5.210	5.059	4.832	↑ 1.063	↑ 1.057	↓ -0.227
East Coast (PADD1)	5.149	5.048	4.886	↑ 1.010	↑ 1.096	↓ -0.162
New England (PADD1A)	5.626	5.508	5.371	↑ 1.283	↑ 1.404	↓ -0.137
Central Atlantic (PADD1B)	5.568	5.503	5.368	↑ 1.320	↑ 1.449	↓ -0.135
Lower Atlantic (PADD1C)	4.943	4.831	4.657	↑ 0.867	↑ 0.932	↓ -0.174
Midwest (PADD2)	5.182	5.011	4.751	↑ 1.089	↑ 0.974	↓ -0.260
Gulf Coast (PADD3)	4.786	4.646	4.415	↑ 0.909	↑ 0.979	↓ -0.231
Rocky Mountain (PADD4)	5.200	5.019	4.795	↑ 1.085	↑ 1.106	↓ -0.224
West Coast (PADD5)	6.289	6.074	5.809	↑ 1.389	↑ 1.351	↓ -0.265
West Coast less California	5.725	5.519	5.238	↑ 1.248	↑ 1.156	↓ -0.281
California	6.940	6.713	6.468	↑ 1.555	↑ 1.575	↓ -0.245

*prices include all taxes

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

Crop Updates



Lettuce Ease, Melon Squeeze

Lettuce markets are finally starting to loosen up after several weeks of elevated pricing and limited availability. Green leaf has already worked its way back toward normal, while romaine, romaine hearts, and iceberg should continue easing over the next two weeks as California production improves. Quality is improving, but we are still seeing some lighter weights, mildew, fringe burn, and internal burn. Better yields are bringing more product to market and creating some much needed relief.

Melons are a different story. The Arizona and California desert seasons finished earlier than expected after whitefly and virus pressure reduced yields and caused late fields to fall apart. Cantaloupe and honeydew supplies are extremely limited during the transition to Central California, and there is very little open market fruit available. New crop cantaloupe has started in a limited way, with better volume expected over the next couple of weeks. Honeydew will follow shortly behind. We should start to see broader relief once Westside production builds, likely around the week of July 5. Until then, lead time and flexibility on size will be important.

Avocado supplies are improving as Mexico's Flor Loca crop begins to arrive. Early fruit may show some lenticel marking from the rainy growing conditions, but that is cosmetic and does not affect the internal quality. We may also see some uneven ripening early in the crop while dry matter continues to build. Flor Loca fruit can stay bright green even when it is ripe, so firmness is still the best way to judge readiness. These early-season traits should improve as the crop matures and volume increases, but good rotation will be important during the transition.



Crop Updates



Strawberry production remains strong in Salinas and Watsonville. Cooler weather should help the fruit firm back up after the recent stretch of heat and heavy volume. The market is steady with some softer undertones as supply is running ahead of demand. Santa Maria continues its seasonal decline, but new late-summer acreage should begin adding fruit over the next few weeks.

Blueberries remain tight as Central Mexico finishes and eastern production struggles with light yields and quality issues. The Pacific Northwest is starting slowly and should build week over week, with Michigan expected to join the mix soon. Raspberries are firming as Mexican production declines faster than California can ramp up, while blackberries remain relatively steady.

Overall, lettuce is finally giving us some relief, but melons will remain the biggest challenge until Central California volume improves. Avocados and strawberries are moving in the right direction, while blueberries and raspberries still need a little more attention. Lead time, size flexibility, and good inventory rotation will be the biggest help through these transitions.

