

The Source

Commodity of the Month - Tender Leaf

MARKET ALERTS

Asparagus: Asparagus supplies remain tight and pricey into fall due to low yields in Peru and an early end to Central Mexico's harvest by mid-August. Expect a supply gap through September, with large sizes especially short.

Citrus (Lemons): Lemon pricing remains high due to tight supplies and strong demand. Ventura/Oxnard leads domestic volume, while offshore arrivals on both coasts help offset shortages.

Citrus (Oranges): CA Valencias skew large (56s/72s); small sizes (113s/138s) are extremely short season-long. Flexibility on size and grade is required. School and DOD accounts must shift demand to 88s or 72s.

Onions: CA and NM will lead summer onion loading. Lower yields keep prices high until PNW new-crop arrives, though WA winter-over volume is available and high freight continues driving the market.

Pineapple: Market is steady to higher with contract priority. Large crowned pineapples are improving, but crownless and organics remain tight. Volume drops soon, driving severe tightness through mid-October.

Potatoes: Large potatoes are tight due to storage loss; order early. WA offers strong mid-size quality. FL colored potatoes have 1–2 weeks left (reds over yellows). NC sweet potatoes remain light until new crop.

Strawberries: Strawberry prices spiked as supplies tightened from processor diversions and cool weather. Expect short volume until Santa Maria picks up in a week.

AUGUST 5, 2026

CROP UPDATES

Small orange supplies (113s/138s) will be extremely tight as school demand surges, since California Valencias are peaking large (72s+) and imports cannot fully bridge the gap; size flexibility, substitutions, or shifting menu mix to grapes and carrots will be necessary. Meanwhile, lemon markets remain firm and high-priced, heavily reliant on Ventura/Oxnard choice fruit and imports to offset tight domestic availability. [Read more](#)

WEATHER

California: High pressure keeps temps near/slightly above average Wednesday (highs from 60s coast to 104 south of Soledad), warms them another 3–7° Fri–Sat, then cools back to Wed levels Sun.

Mexico: Isolated showers and storms bring 0.05”–0.30” of rain through the weekend, with higher local amounts in heavier storms. Warm, seasonal temps continue through Aug 9, with highs in the mid-70s to low 80s and lows in the 50s to low 60s.

Florida: Warm, humid conditions bring weekend showers (0.05”–0.25”, with 1”–2” in heavier storms) and light winds under 15 mph through Friday. Highs hit the upper 80s to mid-90s through Sunday, with lows remaining in the 70s.

Arizona: Phoenix and Yuma see isolated cells but virtually no rain. Maricopa higher elevations carry slight rain chances Wed–Thu before drying Fri–Sat, with better chances central-wide Sun. Temps stay hot (highs mid 100s–110s) with Wed gusts easing through the weekend.

FREIGHT

Freight this week continues to remain steady. We anticipate this pattern to remain consistent for at least the next few weeks.

PRO*FRESH
LOGISTICS

IN PEAK SEASON

- Blueberries
- Raspberries
- Carrots
- Citrus (Oranges)
- Grapes
- Stone Fruit



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Commodity Updates



Apples

The apple market is expected to remain relatively steady over the next few weeks. Golden Delicious supplies continue to tighten, driving prices higher as shippers wrap up the season. Red Delicious inventories are also declining, while Gala and Granny Smith supplies remain adequate. Shipments of the new Gala crop are expected to begin shortly. Fuji and Pink Lady supplies continue to run lighter than normal, and prices could strengthen as demand increases with the start of the school season.

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



Asparagus

ALERT

Mexican asparagus supplies remain tight, with demand continuing to outpace available volume. Central Mexico is expected to finish earlier than normal by mid-August, creating a supply gap through late August and September, while additional production later this fall is not expected to significantly improve availability until October. Peruvian supplies also remain well below projections due to lower yields and weather-related quality issues, with tight production expected to continue as the industry transitions to southern growing regions. Overall, supplies are expected to remain limited, particularly on larger sizes, keeping prices elevated into the fall.

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

Markets are stronger for 48-count and larger fruit, while 60-count and 70-count sizes are trading lower. Flora Loca is currently the primary crop. Dry matter/oil content is averaging around 24%, resulting in a slower ripening process compared to the current late-season Negra crop. California and Peru are also in production.

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



Bell Peppers

California markets remain soft due to steady production, light demand, and continued pricing pressure from lower East Coast markets. East Coast supplies remain strong in the near term; however, heavy rainfall and recent heat are expected to affect quality and reduce yields as the market moves into early August.

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

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

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Commodity Updates



Berries (Blackberries)

Blackberry production remains steady across Central Mexico, Oregon, and California, keeping markets flat.

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

Good volume continues to flow into the fresh market from Oregon, Washington, British Columbia, and Michigan, holding markets steady at lower levels.

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

Strong supplies are coming out of Baja, while California production is beginning to pick up with warmer temperatures.

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

ALERT

Strawberry markets are up sharply this week as supply tightens. A small growing gap has emerged following heavy diversion to processors last week, while cooler weather has further curtailed overall yields. Santa Maria remains about a week away from meaningful volume.

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

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Commodity Updates



Broccoli

Broccoli supplies are starting to tighten as recent fields finish early, creating a gap before younger acreage matures. Expect markets to trend upward heading into next week.

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



Brussel Sprouts

Brussels sprout supplies are strong with solid overall quality. Expect markets to remain steady, with potential upward pressure heading into next week.

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



Carrots

Bakersfield is serving as the primary growing region, with strong availability and good sizing across all carrot packs.

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 are strong across all regions this week, with markets expected to remain steady heading into next week.

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



Celery

Celery markets remain steady overall, with production split between Northern and Southern California. Small sizes are slightly tighter, though all orders are being fully covered. Quality remains above average despite minor seeders, and insect pressure has eased compared to last week. Value-added products carry no current escalations.

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 48s with shipments moving 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 sustained strong demand, keeping pricing firm for the near term. District Two (Ventura/Oxnard) is currently in full production and driving the bulk of domestic volume, while offshore fruit is now arriving on both coasts to help offset tight supplies.

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 crossings remain steady, with supply expected to hold stable over the next three weeks before tightening. Weather conditions continue to impact U.S. No. 1 yields. As Mexican production tapers off, Colombian imports will help backfill volume ahead of Peru's new season launch in September/October.

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

ALERT

The California Valencia orange crop is heavily skewed toward larger fruit, peaking on 56s and 72s. Small sizes (113s and 138s) are extremely limited and will remain tight for the rest of the season. To ensure full order coverage, flexibility on size and grade is required, with substitutions to larger fruit necessary to fill gaps. Suppliers are strictly enforcing contract size averages to manage volume, so please alert school and DOD accounts to shift demand toward 88s or 72s.

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

Markets remain mostly steady with ample promotional opportunities despite slightly lighter Baja production. New York volume is ramping up this week with excellent quality, while local Midwest supplies continue to expand.

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

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

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Commodity Updates



Eggplant

New Jersey production has increased, easing market pressure, while California remains stable with improved volume. Promotable supplies are expected across the East Coast and Midwest over the next several weeks.

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



Garlic

Shipments transitioned to Mexican peeled garlic starting June 22, 2026, and will remain on Mexican product until the new California crop begins 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

California grape markets remain mostly steady as early varieties like Flames and Sugraones finish up. Summer varieties including Krissy and Timpson are hitting full production, with most shippers peaking on Large and Extra-Large sizes across both red and green seedless. Barring major weather disruptions, expect steady pricing, excellent availability, and promotional opportunities ahead.

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 markets expected to hold steady into next week, weather permitting.

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



Kale

Kale supplies and quality remain strong overall, with market 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

Favorable weather has driven strong production out of both Salinas and Santa Maria. Shippers are flexing on pricing, creating prime promotional opportunities, with robust supplies expected for at least the next two weeks. Carton weights are running solid at 39-44 pounds, alongside good color and texture.

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



Lettuce Leaf

Green leaf, red leaf, and romaine will see strong availability throughout the week, alongside excellent supplies on romaine hearts. Fringe burn remains minimal. Lengths and carton weights across all leaf items are running above average with multiple suppliers. Shippers are actively flexing, making this an ideal time to promote heavily over the next few weeks.

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



Lettuce Tender Leaf

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

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



Melon (Cantaloupe)

Domestic cantaloupes are loading out of Central California as harvest shifts into new fields in the Westside region. Production is peaking on 9-count fruit, with good overall supplies and favorable deals available on new-crop volume.

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

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

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Commodity Updates



Melon (Honeydew)

Domestic honeydews are loading out of Central California as harvest transitions into new fields in the Westside region. Production has been peaking on 5-count fruit, with good overall supplies and favorable deals available on new-crop volume.

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



Melon (Watermelon)

Watermelon demand remains steady coming off the holiday ADS period. Supplies are actively available across California, Texas, and the Southeast.

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



Mushroom

Expect price increases as demand continues to outpace available supply following the implementation of new government duties.

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



Onions

ALERT

Central California and New Mexico will handle onion loading for the rest of the summer season. Lower yields are keeping market pricing elevated, a trend expected to persist until new-crop Pacific Northwest supplies hit the market. High freight costs are currently driving the market, though winter-over supplies are actively available in 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

Washington pear growers have begun packing and shipping new-crop supplies this week. In California, the Bartlett deal is running 2-3 weeks ahead of normal timing; while some Delta district shippers have wrapped up harvest, significant shipping volume remains available for several weeks. Meanwhile, harvest is actively underway on Mountain district Bartletts.

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

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

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Commodity Updates



Pineapples

ALERT

Supplies, demand, and quality remain steady with markets holding firm to slightly higher, prioritizing contract business. Larger 6- and 7-count crowned pineapples are improving, while 8-counts hold steady; crownless and organic options remain tight. Total volume will drop over the next two weeks, leading to very tight supplies through mid-October.

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



Potatoes

ALERT

Large potatoes are tightening up as dropping pack-outs impact availability late in the season. Warm winter weather affected storage quality, leaving some potatoes unrunnable and shortening total volume—lead times are recommended to cover orders. Washington is packing excellent quality with volume peaking on mid-sizes, though large and small counts remain snug. Florida colored potatoes have 1–2 weeks left, with yellows tight and reds in better shape. North Carolina sweet potato supplies will stay limited until new crop arrives.

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



Squash

Zucchini and gray squash remain plentiful, while tighter supplies continue to keep yellow squash priced at a premium. New York and New Jersey are seeing strong production with promotable volume, though late-summer heat could begin to tighten Western supplies.

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



Stone Fruit

Peaches, plums, and nectarines are in full production. Peach and nectarine sizing has improved, leaving very little small fruit, while small plums are plentiful and attractively priced. Lighter supplies have firmed the Chilean kiwi market, which will remain the primary source until California resumes in October.

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



Tomatoes

Tomato supplies remain steady as weather-related quality issues clear up with expanding harvests in Tennessee and the region. California and Baja continue to deliver strong, reliable volume, while Virginia leads grape tomato production with solid quality. Production out of Central Mexico and Baja is expected to rise in the coming weeks, further boosting market availability.

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

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

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Weather Updates



CALIFORNIA

High pressure continues to bring near to slightly above-average temperatures Wednesday, with morning lows in the upper 40s to upper 50s. Daytime highs will reach the upper 60s to mid-70s along the coast, the low-to-mid 80s through the Santa Clara Valley and Soledad, and the low 90s up to 104 degrees south of Soledad. The high strengthens Friday—bumping high temperatures up another 3 to 7 degrees through the end of the week—before weakening Sunday to bring a return to Wednesday's levels.



MEXICO

Isolated showers and thunderstorms are expected through the weekend, bringing general rainfall totals of 0.05" to 0.30", with localized higher amounts possible under heavier storms. Temperatures will stay warm and seasonal through August 9th, featuring daytime highs in the mid-70s to low 80s and overnight lows in the mid-50s to low 60s through Sunday.



FLORIDA

Warm, humid air moving into the region will bring elevated temperatures alongside isolated to scattered showers through the weekend. Most showers will yield 0.05" to 0.25" of rain, though heavier thunderstorms could drop 1" to 2". Winds across southeast Florida and the Tampa Bay area will stay light, gusting at or below 15 mph through Friday.

Highs will reach the upper 80s to mid-90s through Sunday, with overnight lows holding in the 70s statewide through Saturday morning.



ARIZONA

As of 1 PM Tuesday, radar shows convective cells drifting northwest across the Greater Phoenix area, alongside small, isolated cells in central Yuma County. Stations report no measurable precipitation so far, aside from a trace in the Yuma Valley.

Maricopa County's higher elevations carry a slight chance of rain Wednesday and Thursday before conditions dry out Friday and Saturday. A much stronger chance of showers will cover central Arizona early Sunday through Sunday night.

Temperatures will stay above normal overall, with valley highs in the mid-100s to low 110s and morning lows in the 80s. Moderate southerly winds gusting 20–25 mph Wednesday afternoon will ease daily heading into the weekend.

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



Freight Updates

Freight this week continues to remain steady. We anticipate this pattern to remain consistent for at least the next few weeks.



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

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

	07/20/26	07/27/26	08/03/26	Change from		
				2 year ago	year ago	week ago
U.S.	5.134	5.313	5.348	↑ 1.593	↑ 1.548	↑ 0.035
East Coast (PADD1)	5.194	5.354	5.299	↑ 1.469	↑ 1.492	↓ -0.055
New England (PADD1A)	5.399	5.518	5.549	↑ 1.476	↑ 1.557	↑ 0.031
Central Atlantic (PADD1B)	5.370	5.579	5.587	↑ 1.596	↑ 1.629	↑ 0.008
Lower Atlantic (PADD1C)	5.107	5.255	5.168	↑ 1.426	↑ 1.435	↓ -0.087
Midwest (PADD2)	4.988	5.196	5.262	↑ 1.533	↑ 1.470	↑ 0.066
Gulf Coast (PADD3)	4.942	5.087	5.141	↑ 1.705	↑ 1.699	↑ 0.054
Rocky Mountain (PADD4)	4.935	5.141	5.285	↑ 1.583	↑ 1.492	↑ 0.144
West Coast (PADD5)	5.877	6.067	6.130	↑ 1.774	↑ 1.590	↑ 0.063
West Coast less California	5.362	5.545	5.623	↑ 1.672	↑ 1.435	↑ 0.078
California	6.471	6.670	6.716	↑ 1.895	↑ 1.770	↑ 0.046

*prices include all taxes

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



Crop Updates

Small Fruit Squeeze

Citrus is moving into the part of summer where sizing matters more than total volume. Schools are coming back online, and demand for small fruit is expected to increase quickly as school and foodservice programs begin filling orders again. The challenge is that California Valencias are not built around that size profile this season. The crop is peaking closer to 72ct and larger, with 113ct and 138ct oranges expected to remain extremely limited.

Valencias are now the main domestic orange in the market. Quality has been fair, but the crop is leaning toward larger fruit at the same time customers are starting to look for smaller sizes. There may be some small fruit available in pockets early in the month, but that should not be viewed as long-term coverage. Once school demand ramps up, small oranges will be harder to cover and size flexibility will be important.

Imported Navels from South Africa and Chile will help supplement summer citrus availability, but those programs are not expected to be a full answer for small fruit. Import volume will help fill some gaps, especially where customers can take larger or mid-size fruit, but school-friendly sizes will remain limited. Substitutions, split sizing, and flexibility between domestic Valencias and imported Navels may be needed to keep orders covered.

We may also continue to see some re-greening on Valencias as summer heat stays active in the San Joaquin Valley. This is a normal seasonal condition where the peel can show a green tint, but it is cosmetic and does not affect flavor, sugar, or eating quality. The bigger issue remains sizing, not eating quality.





Crop Updates

Lemons remain elevated as District Two continues to carry much of the domestic crop. District Two, the Ventura/Oxnard coastal region, typically grades heavier to choice fruit than fancy due to coastal wind exposure. Offshore fruit from Argentina and Chile is helping supplement supply, and Mexican shipments are also building. These programs should help fill some gaps that California cannot cover, but pricing is expected to stay firm until overall availability improves.

As schools come back online, small oranges will be one of the harder items to cover. Carrots and grapes may not be a citrus replacement, but they are a strong items to keep in the school mix: small, kid-friendly, and much easier to plan around than 113ct and 138ct Valencias right now. Lead time, size flexibility, and a willingness to look at other school-friendly produce options will be the best way to stay covered through August.

