

# Market **OUTLOOK**

Week 23: June 1-7, 2026



**Market ALERT**

Apples  
Asparagus  
Avocados  
Basil  
Carrots  
Celery  
Citrus  
Cucumbers  
Lettuce  
Melons  
Peppers  
Squash  
Strawberries

## transportation

Nat'l Diesel Avg: \$5.523↓

Last Year: \$3.487↓

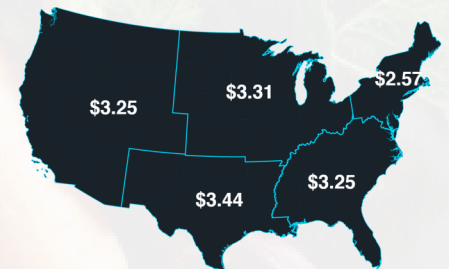
Nat'l Fuel Surcharge: \$0.78

Shortages: Freight market is flat to slightly down settling.

- **extreme** - FL
- **slight** - AZ, CA, & WA

### National Posted Rate per mile

previous week's average outbound reefer rate for each region  
Map from [DAT](#)



## weather **OUTLOOK**

**Oxnard, CA:** Partly cloudy and sunny skies throughout the week with highs in the 60s and 70s and lows in the 50s.

**Salinas, CA:** Partly cloudy and sunny skies with highs in the 60s and 70s and lows in the 40s and 50s.

**Yuma, AZ:** Sunny skies all week with some clouds on Monday with highs in the 100s and lows in the 70s.

**Immokalee, FL:** Thunderstorms all week with highs in the 80s and 90s and lows in the 70s.

**Idaho Falls, ID:** Partly cloudy and sunny skies with highs in the 70s and 80s and lows in the 30s, 40s and 50s.





# Market UPDATE

## apples



**ALERT** Prolonged September heat required heavy irrigation to protect tree health and maintain fruit quality, but it also pushed fruit sizes larger across the industry. Washington's Gala crop is more than 4 million boxes below last year, and current sizing is peaking on medium to large, leaving 125/138 counts in very limited supply. Markets are expected to firm, and shifting to other red varieties—such as Fuji or Pink Lady—is strongly recommended where possible. Granny Smith sizes are also running large, with 125/138 counts virtually unavailable and no comparable green variety to substitute. The variety is expected to remain at premium market levels, and customers are encouraged to plan for alternative fruits when small-size needs cannot be met.

## asparagus



**RADAR** The market is more balanced heading into early June as increased domestic supply and imports improve availability. Prices have eased, but the category remains sensitive due to earlier gaps and tight global conditions. Quality is fair to good with some variability; sizing is normalizing. Expect peak domestic production in early June, followed by gradual tightening later in the month as supply shifts back to more limited imports.

## avocados



**ALERT** Crossings have tightened sharply this week, with Mexico harvests dropping below 900 trucks, driving prices up as buyers compete for limited supply. The rapid shift is due to reduced harvest activity, intentional supply controls from growers holding fruit for higher late-season pricing, minimal inventory buffers, and a transition gap as Peruvian volume has not yet ramped up to offset the pullback, all while demand remains steady. This has quickly flipped

the market from oversupplied to constrained. Mexican supply is expected to control pricing for the next 2–3 weeks until Peru increases volume, so in the interim, opening specs is recommended to help mitigate delays and support order fulfillment.

## bananas



Supply remains steady with reliable shipping and well-balanced conditions. Availability continues to meet demand, and pricing is holding stable with no disruptions expected in the near term.

## beans



**Green Beans:** Conditions vary by region. Eastern supplies are steady with good quality and balanced demand, keeping pricing stable to slightly lower. Western supplies remain tight due to transition gaps and acreage shifts, resulting in elevated and volatile markets. Desert production is expected to provide gradual relief. Overall demand remains solid, but availability and sizing can be uneven, especially for foodservice-preferred grades.

## berries



**Blackberries:** Limited domestic volume has started in Central CA, with additional production from Georgia; most supply still comes from Mexico. Quality and volumes are good, while demand has eased. Domestic volume should increase by mid-June.

**Blueberries:** Mexico supply is declining, while Georgia and California remain steady. Central Valley is ramping up slowly due to labor and weather disruptions. Cooler temperatures and softer demand this week. Overall crop quality is strong, with good size and availability across pack sizes.



# Market UPDATE

## berries cont...



**Raspberries:** Volumes continue to improve week over week, with gradual increases expected into early next month and peak in June. Watsonville harvest is underway with light seasonal volume; early fruit shows strong firmness and clean quality.

**Strawberries:** **ALERT** Demand exceeds supply in the Salinas Valley due to rain delays and cooler weather slowing ripening. Harvest crews picked ahead of storms, but availability remains tight. Supplies are expected to improve in a few weeks.

## broccoli



**Broccoli:** Supplies improved as crops recover from prior weather inconsistency. Availability will continue to increase from Salinas and Santa Maria. Demand remains strong while volume and quality are improving.

**Broccolini:** Supplies improved this week while demand remains high. Pricing has eased with better availability. Quality is good, and supplies and markets should continue improving over the next few weeks.

## brussels sprouts



Supplies and quality are stable. Availability should remain steady, supporting promotional opportunities. Pricing is expected to hold steady as demand stabilizes.

## cabbages



Supplies and quality are good from Central CA. Demand is up, but pricing remains stable. Supplies should stay consistent during the regional transition.

## carrots



**ALERT** The market is showing steady improvement, with production now centered in Coachella and the Imperial Valley. Warmer temperatures are helping crops size up and boosting yields, supporting a gradual recovery. Fill rates are improving and should continue to strengthen over the next couple of weeks. Cello and jumbo remain very limited, as sizing is still the main constraint across the industry. An early transition into Salinas could help bring additional balance to supply, but full normalization will take time as sizing and yields continue to rebound.

## cauliflower



Supplies and quality have improved despite prior weather-related inconsistencies. Product is shipping from Salinas and Santa Maria, CA. Expect continued improvement in supply and markets in the coming weeks.

## celery



**ALERT** Supplies remain light with elevated demand continuing to pressure the market. Improvement is not expected until early June with the Salinas start. Quality is fair. Expect limited availability and higher pricing in the near term.

## citrus



**Limes:** **RADAR** Volume is improving as crossings from Mexico increase, but supply remains volatile and inconsistent week to week. Colombian supply offers some support but doesn't fully resolve size imbalances. Expect easing prices, though volatility will continue due to inconsistent supply and weather sensitivity.



# Market UPDATE

## *citrus cont...*



**Lemons: RADAR** The market remains firm, with tight supply—especially smaller sizes—as fruit skews large. Production is transitioning to coastal regions, and Southern Hemisphere imports are beginning to add volume but not fully balance the market. Quality is good overall. Expect continued tightness on small fruit through early June, with gradual relief as imports increase, though size imbalances will persist.

**Oranges: ALERT** The market is transitioning from Navels to Valencias, with stable supply overall but ongoing shortages of smaller sizes due to large fruit skew. Pricing has softened slightly amid mixed quality (granulation, lower acidity). Expect improved availability as Valencia volumes build, but size challenges and some variability will continue until the crop stabilizes.

## *corn*



Supply and quality continue to improve week over week. Mexico is seeing better growing conditions and fewer quality issues, while Georgia is ramping up. Regional transitions and improved Eastern production are helping ease market pressure.

## *cucumbers*



**ALERT** Supplies remain tight due to a difficult Florida-to-Georgia transition. Georgia is light but improving, with additional relief expected in 7–10 days and North Carolina starting in early June. Western regions are transitioning, with Baja just starting and building. Quality is generally acceptable, led by strong Baja product.

## *grapes*

Mexican supply is ramping up heading into June,

with volumes increasing. This is driving improved quality and more favorable pricing as inventories build.

## *herbs*



Markets are generally stable with strong demand and diversified sourcing. Most items (parsley, cilantro, rosemary, thyme) are well supplied with steady pricing and good quality.

**Basil: RADAR** Supplies remain tight due to weather-related disruptions. Expected to remain tight until production recovers.

**Cilantro:** Supplies are steady with fair quality and strong demand. Improved availability from Oxnard and Salinas is helping ease the market, with further improvement expected.

## *kale*



Steady supplies and pricing with good demand. Quality is fair, with product shipping from Oxnard and Central CA.

## *lettuce*



**Green & Red Leaf: EXTREME** Supplies remain very limited with only fair quality due to prior weather stress and INSV pressure. Yields are low, driving extreme pricing. Limited supply is expected through the second week of June.

**Iceberg: EXTREME** Supplies remain light with ongoing quality and yield challenges from weather and early INSV. Weights are below normal and demand is strong. Markets will stay elevated with limited availability over the next few weeks.

**Romaine: EXTREME** Light supplies, fair quality, and strong demand continue due to weather issues and INSV. Lower yields and lighter weights



# Market UPDATE

## lettuce cont...



are driving extreme pricing. Tight supply is expected for the next few weeks.

**Tender Leaf:** Supplies are steady with improving quality as production shifts to Central CA. Reduced insect pressure is expected, easing overall market conditions.

## melons



**Cantaloupe & Honeydew:** **ALERT** Arizona production began over two weeks early due to elevated temperatures, with strong initial harvests and larger sizing, but we are now entering an expected production gap that should help stabilize the market near term. The larger concern is an early seasonal finish, now projected for mid-June instead of late June, creating the potential for a 7–10 day supply gap before California production begins around June 26, which could drive upward market pressure depending on how quickly California volume ramps up.

## mushrooms



Supplies and quality have improved, with strong demand. The market is entering peak production, with ample supply and good quality expected in the coming months.

## onions



The market is strengthening as OR/ID storage winds down, tightening supplies and pushing prices upward. Texas is finishing, while California is starting with lighter but strong-quality volume, and New Mexico has just begun. This mix is creating upward pressure, especially on high-quality yellows and reds. As the transition continues, the market is expected to stay firm,

with price increases likely unless new-crop volume accelerates or weather-related constraints ease.

## onions green



Supplies continue to improve, primarily from Mexico. Availability trends remain positive, supporting gradual market easing.

## pears



Washington's 2025 crop is rebounding after a challenging 2024 season, with growers reporting excellent bloom, minimal frost damage, and strong, uniform sizing. Early estimates suggest the crop could exceed 400K tons, returning to pre-2022 levels, thanks to favorable spring weather and improved orchard management.

## peppers bell



Supply is coming from Central Mexico and Canada, with strong demand favoring Canadian product due to quality. Eastern Canada is ramping after delays, while Western Canada is recovering with new harvests. Volumes are expected to start normalizing within the next week.

## peppers chili



**ALERT** Plant City is at peak with most varieties available, though poblanos and tomatillos remain very limited. South Florida is ending while Georgia ramps up. Western supply is split across Sonora, Baja, Central Mexico, and California—overall moderate, but tight on serranos, poblanos, and habaneros. Baja and California are building, though poblanos will stay tight for 2–3 weeks.



# Market UPDATE

## pineapples



The market is starting to tighten slightly in late May. While post-holiday demand has eased, ongoing weather and disease challenges in Costa Rica continue to impact yields and sizing. Supply remains adequate and should stay steady into early June, helping limit major price increases in the near term.

with uneven quality but should improve in 7–10 days as more regions come online. Western supply is light, centered in Santa Maria and Fresno. Warmer weather should support increased production soon.

## potatoes



Idaho russets are now shipping from storage, with this season's crop showing improved quality and a stronger size profile. Larger sizes are more readily available compared to last year. Market pricing is steady, supported by ample supplies, creating favorable promotional conditions.

## tomatoes



Grape tomatoes are steady out of Ruskin/ Palmetto with good quality, transitioning to South Carolina in early June, while Mexico winds down and Baja builds toward mid- to late-June. Roma production is declining in Florida with smaller sizing as the region wraps up, shifting East Coast supply to Georgia and South Carolina; Western Mexico is also winding down, with Baja volumes expected to increase by mid-June amid some Central Mexico variability. Round tomatoes remain steady in Florida with strong quality, with harvests wrapping up and transitioning smoothly to South Carolina and Quincy, while Western supply shifts from Mexico to a ramping Baja.

## squash



**ALERT** Eastern supply is steady but limited as Florida winds down; Georgia is off to a slow start

*produce in* **PEAK** *for June*

Artichokes	Leeks	Peaches
Bananas	Mango	Strawberries
Celery	Papaya	Tomatoes
Grapes	Peas	



# Market UPDATE

*in the news...*

## How Global Shockwaves From the Strait of Hormuz Will Drive Up Produce Prices Into 2027

Jill Dutton | May 28, 2026 | [thepacker.com](http://thepacker.com)

In the fertile soil of the Red River Valley along the Minnesota-North Dakota border, Tony Pulkrabek operates an agricultural business that most independent farmers would envy. He owns his land outright. He owns all of his machinery. He even holds direct stock in his cooperative, ensuring he doesn't have to split profits with joint-venture partners.

By all traditional metrics of financial stability, Pulkrabek should be thriving. Yet, as he looks toward the upcoming season, his projected profit margins have dwindled to a razor-thin 5% — leaving virtually no safety net if a single piece of equipment breaks or fuel prices tick up even a fraction of a percent. The culprit is a volatile cocktail of global geopolitics and skyrocketing input costs thousands of miles away that is actively gutting his bottom line.

To understand how the reality for boots-on-the-ground farmers like Pulkrabek connects directly to the prices consumers pay at the grocery store, The Packer synthesized insights from a broad spectrum of industry specialists. Together, their insights reveal an industry operating on borrowed time: a multilayered market where immediate on-farm crises are being masked by corporate cushions, setting the stage for a delayed economic reckoning.

### Primary Drivers: A Transport and Fertilizer Crisis

Rising fuel and fertilizer costs have transformed general inflation into a tangible operational wall for the fresh produce sector.

Unlike row crops such as corn, soybeans or wheat, which can be stored in grain bins for months while farmers wait for favorable shipping rates or market rebounds, fresh produce is entirely bound to the clock. Perishable fruits and vegetables require an immediate, unbroken cold chain from the field to the retail shelf.

"This is still mostly about inputs. It's not getting any better," says Missouri farmer Will Westmoreland, executive director of The Back Forty. "There's no sun on the horizon. There's no silver lining. It's just not getting any better ... You've got gasoline prices that are still going up, diesel fuel prices that are still going up. So, that's a primary driver, and for produce, I think the one thing a lot of people don't understand, even farmers that don't grow produce, is how dependent the produce market is on fuel."

Westmoreland stresses that this dependency magnifies every tick of the oil market.

"You've got trucking, you've got refrigeration, you've got fertilizer as your normal inputs and then you've got to have rapid transportation ... You can't let it sit there like you can a lot of the other row crops, until, you know,

maybe fuel price drops or you get a higher price on the market."

Compounding these fuel costs is an unprecedented spike in global fertilizer markets. Westmoreland notes that "in produce, fertilizer inputs have gone up 50% on average," and for specialty or intensive crops, that number is often much higher.

### Red River Valley: Why Low Margins Leave No Room for Error

The real-world manifestation of Westmoreland's input warning is precisely what Pulkrabek is navigating in Minnesota. When global events triggered sudden spikes in energy markets, the impact hit his invoices instantly.

"Right now their urea is selling at over \$1,000 a ton," Pulkrabek says, recounting how rapidly his costs shifted midseason. "[We] got into the \$580 stuff, ran out of that, and then got invoiced for \$940 a ton, which I believe the vendor actually probably gave us a deal on because we bought so much from him ... I did ask him where the current market is, to buy from him, and he said it's over \$1,000 a ton."

Pulkrabek notes that the economic catalyst was almost instantaneous.

"Between when the U.S. and Israel decided to bomb Iran, and then they shut down the strait, that affected...

[Read full article HERE](#)

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to [jhoppe@nproduce.com](mailto:jhoppe@nproduce.com) and we will be happy to give you those current market conditions. Also look for our Spanish version that will be released on Monday. Have a great week!

Your Dedicated NPC Powered by Foodbuy Staff