

Market **OUTLOOK**

Week 25: June 15–21, 2026



Market **ALERT**

Apples
Asparagus
Avocados
Berries
Cantaloupe
Celery
Citrus
Eggplant
Lettuce
Peppers
Potatoes

transportation

Nat'l Diesel Avg: \$5.210↓

Last Year: \$3.471↓

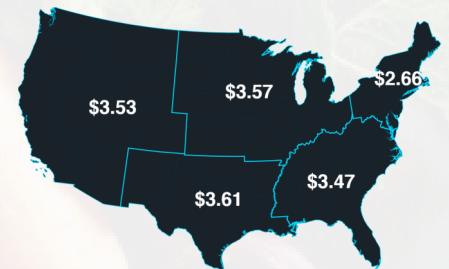
Nat'l Fuel Surcharge: \$0.72

Shortages: Freight market is flat

- extreme - FL
- slight - AZ & CA

National Posted Rate per mile

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



weather **OUTLOOK**

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

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

Yuma, AZ: Sunny skies with highs in the 100s and 110s and lows in the 70s and 80s.

Immokalee, FL: Evening thunderstorms with highs in the 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 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 Supply is transitioning from balanced to tightening. Strong overlap from Mexico, domestic regions, and imports supported availability earlier in June, but domestic production is now winding down and expected to end late June into early July. Peruvian supply remains inconsistent due to logistics delays, limiting backup coverage. As reliance shifts back to Mexico and Peru, availability will tighten, supporting firmer pricing into late June. Quality is generally acceptable but may vary during regional transitions. Expect movement from ample supply to a more demand-driven market with upward pressure near term.

avocados



RADAR The market remains volatile as Mexican supply tightens with the main crop winding down and growers slowing harvests to capitalize on higher pricing. Shipments are below U.S. demand, driving elevated costs, while California supply is insufficient to close the gap. Peru is ramping up,

but weather is impacting sizing and may shorten the season. Expect continued tight supply and elevated pricing through June until Peru volumes and the next Mexican crop bring stability in July.

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: Light domestic volume has begun in Central CA and Georgia, with limited North Carolina expected. Mexico remains the primary source but is declining quickly. Demand has softened, with domestic production expected to build by late June.

Blueberries: **ALERT** Volumes are declining on both coasts, with South East quality limiting pack sizes. Early crop is lighter year over year due to damage to first picks; later varieties look better. New Jersey is just starting, and Pacific North West harvest begins in about a week. Supply will remain tight through month-end.

Raspberries: Volumes are steady with a slight increase and gradual growth expected.



Market UPDATE

berries cont...



Watsonville has begun harvest with light volume but strong quality. Peak volumes are still expected through June, presenting a good promotional opportunity.

Strawberries: **ALERT** Supply remains steady out of Salinas, though yields are below prior years and movement is slow. Slight increases are expected in the coming weeks. Softer demand is easing markets. With no major weather risks, supply should stay stable. Santa Maria has ended its season.

broccoli



Broccoli: Supplies are steady and improving as crops recover from earlier inconsistencies. Sourcing from Salinas and Santa Maria. Quality is improving, with steady supply expected.

Brocolini: Supplies are steady and demand is strong. Availability and pricing have improved, with stable markets expected.

brussels sprouts



Supplies are steady with improved quality reported. Availability is expected to remain consistent, offering promotional opportunities. Demand has stabilized, and pricing is expected to hold steady in the near term.

cabbages



Supplies are steady with strong yields and quality in Central CA. Demand has increased, but pricing remains stable. Production has fully transitioned to Central California.

carrots



Fill rates are strong and continuing to improve

week over week. Growing conditions are favorable across regions: Kern County conventional are benefiting from warm, sunny weather and sizing well; Salinas Valley conventional carrots are thriving under cool mornings and mild afternoons; and Avenal's organic fields are performing well with warm, dry conditions.

cauliflower



Supplies are lighter due to prior weather-related challenges that impacted yields. Demand has increased, putting pressure on the market. Quality is improving, but tighter volumes are expected to keep pricing elevated in the short term.

celery



ALERT Supplies remain light as demand has increased, keeping the market active. Salinas harvest has begun, with supply expected to improve gradually. Quality is improving, which should help ease market pressure and support better pricing in the coming weeks.

citrus



Limes: Pricing is easing slightly as Mexican volumes increase, though sizing challenges and uneven supply persist. Earlier weather impacts reduced production and affected sizing, while Colombia provides steady but supplemental volume. Quality remains mixed due to scarring and grading losses. Expect improved availability overall, but continued size imbalances near term.

Lemons: **RADAR** The market is steady but tight, with California as the primary supplier. Supply is generally meeting demand without surplus, and summer demand is expected to firm pricing. Quality is good, though sizing may fluctuate. Imports remain limited, keeping the market



Market UPDATE

citrus cont...



stable-to-firm. Expect slight price increases and tightening availability in the near term.

Oranges: RADAR California supply remains limited, requiring size substitutions. Early Valencia production is not yet sufficient to stabilize the market, with large sizes especially tight. Quality is good, but supply gaps and sizing constraints are driving elevated pricing. Expect continued tightness until Valencia volume improves later in June, gradually easing availability and sizing issues.

corn



Availability and quality continue to improve week over week. Mexico is seeing fewer quality issues, and Georgia is beginning to ramp up. Better soil conditions, less rain, and increased production in Mexico are supporting recovery, easing market pressure slightly as regions transition.

cucumbers



Georgia leads Eastern supply with solid volume, though some off-grade quality remains due to earlier weather. North Carolina is ramping quickly, with New Jersey and other local regions adding to more regionalized supply. In the West, Sonora is winding down with fair quality, Central Mexico is steady, and Baja is increasing with good quality—keeping overall availability adequate with improving trends.

eggplant



ALERT Eastern supply remains tight, with Plant City declining and Georgia still light, though gradual improvement is expected. North Carolina is projected to start in 3 weeks, followed by other regional programs. In the West, California is

transitioning into Fresno with volumes set to ramp, while Central Mexico provides minimal supplemental supply.

grapes



The Mexican crop ended earlier than expected due to unseasonably warm temperatures, creating a supply gap until California production ramps up in late June. Availability will be tight during this transition period, and buyers should plan for limited supply.

herbs



Markets (especially cilantro) are moderately supplied with slight upward price pressure. Output from California and Mexico remains steady but not abundant, while weather disruptions have caused occasional harvest inconsistencies and some quality variability. Availability is sufficient overall, though broader disease pressure and tight leafy green supply may impact harvest efficiency. Expect mostly steady conditions with a slight upward pricing bias, particularly if weather volatility persists.

kale



Supplies remain steady with good demand and fair quality. Production is from Oxnard and Central CA, with stable pricing expected.

lettuce



Green & Red Leaf: EXTREME Supplies remain very limited, with only fair quality reported. Earlier warm weather caused growing inconsistencies, and INSV has impacted some fields, reducing yields further. Markets have reached extreme levels and are expected to stay elevated for the next few weeks.

Iceberg: EXTREME Supplies are very light with



Market UPDATE

lettuce cont...



strong demand. Weather fluctuations have impacted yields and head size, resulting in lighter carton weights. Quality issues and early signs of INSV are also present. Processors are actively seeking additional supply, keeping markets at extreme levels with limited availability expected to continue.

Romaine: **EXTREME** Supplies remain very limited with only fair quality. Growing inconsistencies and disease pressure (INSV) are impacting yields. Strong demand combined with lighter weights is driving elevated markets, which are expected to persist for several more weeks.

Tender Leaf: Supplies are good with steady volumes helping ease market pressure. As production transitions back to Central CA, quality is improving. Stable supply and market pricing are expected over the next few weeks.

melons



Cantaloupe: **ALERT** The Arizona season is wrapping up early and has been under significant stress. Unseasonably warm weather in February and March increased whitefly pressure, which weakened plants, sped up harvest timing, and reduced sizing to mostly 12s and 15s for the remainder of Yuma production. Harvest is expected to finish around June 12, leading to an industry-wide gap of about 10–14 days before California supply begins around June 22. All desert regions are impacted, with very limited availability expected from June 15–26.

Honeydew: Supply remains strong, with consistently good sizing and high-quality fruit. Growing conditions are favorable, and overall availability is plentiful.

mushrooms



Supplies and quality have improved, with strong demand. The market is entering peak production and should remain well-supplied in the coming months.

onions



Supplies are now being shipped from California, New Mexico, and Georgia. All colors and sizes are available, with continued strong quality. Market prices have decreased slightly.

onions green



Supplies remain steady week over week, primarily sourced from Mexico. Availability is improving, supporting more favorable market conditions. Supply and pricing are expected to remain stable.

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



ALERT East supplies are light as Plant City winds down with smaller, off-grade fruit, while Georgia ramps with mostly jumbo sizing; output should improve soon, with additional volume from the Carolinas later in June. In the West, California is transitioning with good quality, but mainland Mexico volume remains limited with constrained sizing and quality options.



Market UPDATE

peppers chili



Eastern supply is in good shape as production shifts from Plant City to Georgia, with adequate volumes overall, though poblanos are limited and tomatillos remain minimal. Quality is steady. In the West, light to moderate supply from mainland Mexico, Baja, and early California supports the market, with tight habaneros and poblanos. Improving Baja and California production should enhance availability in the coming weeks.

and strong early crop conditions point to solid production potential despite the cutbacks, while fingerlings are experiencing a short-term supply gap of 4–6 weeks.

squash



Eastern supply is improving as Georgia, North Carolina, and New Jersey ramp up with good-quality product from newer fields. In the West, Sonora is finishing zucchini and done with yellow squash; Baja zucchini is increasing but yellow remains limited. California has started in Fresno and Santa Maria, with minor weather disruptions but stable supply.

pineapples



The market is starting to tighten slightly. 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.

tomatoes



Grape tomato supply is adequate as Florida winds down, with light but building Eastern volumes supporting the transition, while Baja improvements help offset lighter West supply as Sinaloa tapers. Roma supply is also transitioning, with Florida declining and limited Eastern acreage keeping supply tight until July, though West volumes are expected to improve with stronger Baja and Central Mexico output. Round tomatoes remain steady in Florida with strong quality and minimal disruptions, with Eastern supply shifting smoothly north in early June, while Mexico winds down and Baja ramps up to build West volumes.

potatoes



RADAR Idaho is currently shipping Burbanks, with prices slightly higher, though supplies remain ample expected to stay plentiful until Norkotah harvest begins early September. Planting for the 2026 crop finished earlier than normal, and acreage has been reduced to 300,000 acres (-4.8% YoY) in response to 2025 oversupply; however, favorable weather, adequate irrigation,



Market UPDATE

in the news

No Cantaloupes for the Fourth of July? Historic Desert Heat, Virus Decimates Crops

An unseasonably warm winter in the Southwest desert has accelerated a destructive whitefly virus outbreak, cutting yields by up to 40% and forcing major shippers into a temporary, near-total two-week supply blackout before northern crops recover.

Jill Dutton | June 12, 2026 | thepacker.com

When Legend Produce founder Barry Zwillinger stepped onto a green, thriving desert cantaloupe field one Monday morning, he expected a healthy harvest. By Wednesday, the rapid devastation of an aggressive insect-vectored virus had left the crop completely unrecognizable.

"I took a video of it yesterday ... and it looks like I hadn't been in that field in a month," Zwillinger says, detailing how quickly the fields collapsed. "It's like part of the vine just disappear[ed] ... whatever is left there just gets totally sunburned."

This sudden vanishing act is the reality currently facing the Western melon industry. In what growers describe as an unprecedented operational crisis, a perfect storm of historic winter heat and a prolific plant virus has decimated crops across the lower Southwest

desert — primarily the Yuma, Wellton and Imperial Valley regions. The resulting yield collapse has triggered a near-total two-week supply gap for cantaloupes, forcing major shippers like Classic Fruit Co. to take the rare legal step of issuing force majeure letters to their retail grocery partners.

The message from the industry's top shipping operations — including Legend Produce, Five Crowns Marketing and Westside Produce — to the retail industry is clear: Expect a temporary but absolute disruption in supply.

"My peak day for harvesting cantaloupe in Yuma should have been Father's Day weekend ... and I won't pick a melon in Yuma next Thursday, Friday, Saturday, Sunday," Zwillinger says, emphasizing that this is not a minor distribution slowdown. "It's not

that I'm limited [in] what I can pick or pack or ship somebody at the end of next week. I don't have anything ... like zero, and that has never happened before."

Daren Van Dyke, vice president of sales and marketing for Five Crowns Marketing, echoed the sentiment simply: "I have no idea where I'm going to go to get the fruit."

The Root of the Shortage

The crisis began with a historically warm winter that disrupted the natural biological checks of the desert ecosystem.

"Normally in the desert areas, we have freeze periods, and those freeze periods can impact you in January, February, March," explains...

[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 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!

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