

Market **OUTLOOK**

Week 26: June 22–28, 2026



Market ALERT

- Apples
- Asparagus
- Avocados
- Berries
- Cantaloupe
- Citrus
- Eggplant
- Lettuce
- Peppers
- Potatoes

transportation

Nat'l Diesel Avg: \$5.059↓

Last Year: \$3.571↑

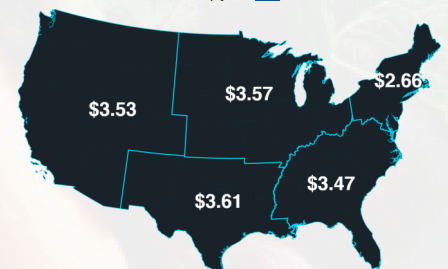
Nat'l Fuel Surcharge: \$0.69

Shortages: Freight market is flat

- extreme - FL
- slight - 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 with highs in the 60s and 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: Mostly sunny skies with some clouds on Sat with highs in the 80s and lows in the 40s and 50s.



Market UPDATE

apples



RADAR Washington movement remains steady. Smaller sizes are tighter, while overall demand softens seasonally with schools out. Red Delicious inventories are down significantly year over year, making it difficult to carry through to new crop. Golden Delicious is in line with last year, but smaller sizes may see gaps. Granny Smith supply is higher year over year, supporting transition to new crop. Peak sizes remain 80/88ct, with fewer smaller counts available—potentially tightening further by August as schools return. Fuji and Pink varieties are down overall but should make it to new crop.

asparagus



RADAR Markets are oversupplied as strong production from Mexico, Baja, and the West Coast continues to outpace demand, keeping pricing under pressure. Early Peruvian volume is starting to build, adding to supply and limiting near-term price upside. Freight—especially on the West Coast—is slowing movement and creating some regional imbalances. Domestic seasons are winding down, with reliance shifting back to imports. As that transition unfolds from late June into early July, the market should firm modestly as supply tightens and becomes more concentrated. Quality is solid overall; the main risk is timing between domestic exit and import ramp-up, which could create brief tightening windows.

avocados



RADAR California production continues to supplement supply, while Peruvian volume is beginning to build and will become more impactful into late June and early July. Late-season Mexico fruit has strong quality and high oil content, but faster ripening is shortening shelf life

and increasing handling risk. Early Flor Loca fruit is entering in limited volume with slower, more variable ripening. The market remains supply-driven, with tight conditions expected through the rest of June despite early signs of stabilization.

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: **ALERT** Light Central CA production has started, but demand exceeds supply. Georgia is winding down, Mexico is past peak, and North Carolina is just beginning with limited volume. Expect tight markets until domestic supply improves late June.

Blueberries: **ALERT** Volumes are declining on both coasts, with Southeast quality limiting large packs. Georgia has ~10 days remaining, while New Jersey is starting. Pacific Northwest harvest begins soon. Supplies will stay tight through month-end.

Raspberries: Volumes remain strong and are gradually increasing, with peak expected through June. Watsonville harvest has begun with light



Market UPDATE

berries cont...



volume but good early quality.

Strawberries: **ALERT** Supply has improved out of Salinas as plants recover and production ramps up into early peak. With favorable weather, good availability is expected in the coming weeks. Santa Maria harvest has wrapped up.

broccoli



Broccoli: Supply will be steady as crops recover from prior challenges. Production from Salinas and Santa Maria is at expected levels. Demand has increased, but quality remains good. Steady supply is expected over the next few weeks.

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

brussels sprouts



Supply and quality continue to improve, with steady availability expected for the next few weeks. This supports promotional opportunities. Pricing should remain stable as demand levels out.

cabbages



Steady supply with good yields and quality from Central CA. Demand has increased, but pricing remains stable. Supplies are expected to stay consistent.

carrots



Fill rates are strong and continuing to improve week over week. Growing conditions are favorable across regions: Kern County conventional carrots 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 light, with yields expected to remain at current levels. Demand is up, and quality has improved. Product from Salinas and Santa Maria is seeing upward pricing pressure due to tighter volumes.

celery



Supply has improved with transition to Salinas production. Demand is steady, quality is good, and improved availability is helping ease market pricing.

citrus



Limes: Mexico remains the primary driver of supply, with volume trending higher, though markets continue reacting to harvest pace and border flow. Colombia provides supplemental volume with less influence. Quality is generally good, but heat and seasonal transitions are causing variability in size and shelf life. The category is moving toward better balance, though flexibility on sizing and sourcing is still needed.

Lemons: **RADAR** California supply is moderate in the D2 season, with stable but not abundant production keeping markets firm amid limited imports. Fruit is coloring well following earlier green fruit challenges, and internal quality remains strong. Sizing imbalances persist, with tighter availability on larger fruit. Minor cosmetic and softness issues continue due to early drop and coastal conditions. Pricing has stabilized at elevated levels. Southern Hemisphere imports are expected to increase, but timing will



Market UPDATE

citrus cont...



determine how much they offset domestic constraints.

Oranges: RADAR Valencias are showing strong internal quality, but early-season challenges—including re-greening and limited initial volume—are constraining supply. Sizing remains imbalanced, with more larger fruit and tightness on smaller sizes, requiring flexibility. As Navels fully exit and Valencia volume builds, the market should remain firm with inconsistent availability until supply stabilizes.

corn



Supply and quality have improved, with conditions strengthening week over week. Mexico quality is improving as weather stabilizes, while Georgia production is increasing. As regions transition and Eastern quality improves, market pressure has eased.

cucumbers



Eastern supply is steady with overlap from Georgia and North Carolina. Georgia will run 2–3 more weeks; North Carolina is at peak but will taper soon, with New Jersey starting shortly. In the West, mainland Mexico is winding down with declining quality, while Baja is strengthening and becoming the primary summer source.

eggplant



ALERT Supply remains tight but is improving, with increased Georgia production and additional volume expected from North Carolina within 7–10 days. More regional programs will ramp up in July. In the West, production is shifting to Fresno with harvest building, supported by Central Mexico volume.

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 are mostly balanced with steady supply and moderate demand, supported by consistent multi-region production. Some items remain tight due to lighter yields and field conditions. Quality is generally good, though heat and localized weather are affecting growth rates and shelf life—especially for more delicate varieties. Broader produce volatility from weather, disease pressure, and rising input costs could lead to intermittent disruptions as summer progresses. Overall, the category remains serviceable, with occasional tightening and quality variability by origin.

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 limited with only fair quality due to prior heat-related inconsistencies. INSV pressure is impacting yields. Strong demand and short supply are driving extreme pricing, expected to persist for several weeks.

Iceberg: EXTREME Supplies are very light due to past weather challenges affecting yields and weights. Demand remains strong, with



Market UPDATE

lettuce cont...



processors seeking additional acreage. Quality concerns (including INSV) persist. Markets will remain highly elevated for the next few weeks.

Romaine: EXTREME Supplies are very light with fair quality and ongoing field issues, including INSV. Strong demand and reduced yields continue to push markets higher. Tight supply and elevated pricing will persist in the near term.

Tender Leaf: Supplies are steady with consistent grower volume. Markets are stable, and quality is improving as production from Central CA continues.

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



Supply has improved while demand remains strong. Quality is good. Seasonal summer volatility is possible, but current supply and pricing are stable.

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 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



Anjou pears have roughly 8–9 weeks of supply remaining. New crop Bartletts are expected to start in early August, aligning closely with the end of Anjou shipments. Red Anjous and Bosc are expected to wrap up within the next month.

peppers bell



ALERT Supply is in transition, with Georgia declining and having spotty availability—especially on larger sizes. North and South Carolina will begin shortly, helping stabilize supply until more regional programs ramp up. In the West, California desert and Bakersfield are producing light to moderate volume with good quality, as production shifts toward Fresno in July.



Market UPDATE

peppers chili



ALERT Supply is centered in Georgia with good availability and minor quality issues, expected to last 2–3 more weeks. As Georgia winds down, supply will shift to smaller regional programs (NC, KY, NJ), with MI and NY ramping up by August. Western supply remains light and fragmented (Nogales, Baja, CA), but variety and availability should improve as Baja and California progress. Anaheims remain slightly elevated.

pineapples



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

potatoes



RADAR Idaho is currently shipping Burbanks, with prices slightly higher, though supplies remain ample and are 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, 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



Supplies are ample with good quality, supported by GA, NC, NJ, and KY. Volume will continue to build as northern regions ramp up. In the West, California and Baja lead supply, with strong zucchini quality and minor wind scarring on some yellow squash. The Pacific Northwest is adding additional volume.

tomatoes



Grape, roma, and round tomato markets are mixed but improving across regions. In the East, supply is centered in South Carolina and Quincy, FL—grape tomatoes remain steady, roma are tight, and round tomatoes are at peak but limited—with all transitioning to stronger volumes from Virginia and the Tennessee/North Carolina mountains by early July. In the West, Mexico is in a lighter production phase as Sinaloa winds down, though Central Mexico and Baja continue with moderate volumes and stabilizing quality. California has begun limited harvests, with more growers coming online through early July to gradually boost availability.



Market UPDATE

in the news...

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

Jill Dutton | June 12, 2026 | thepacker.com

A 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 Garrett Patricio, president of Westside Produce. "When we have freezing temperatures, the freezing temperatures kill off all the pests and prevent a lot of pressures. Well, when you have warm temperatures, everything germinates faster."

Van Dyke adds that the region experienced the hottest March in...
[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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