

Overview

Tomato production has been fluctuating in South Carolina, Tennessee, and Virginia due to rain, while Mexico's production of Rounds and Romas remains steady. We are finally starting to see some relief in the Snacking Tomato market but still expect some challenges over the next week. In California, Tomato production remains steady.

The **Lime** market will begin to ease as more volume crosses the border, with peak sizing concentrated on smaller fruit. Sizes 175 and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks.

Hot Pepper production is expected to stabilize for most varieties; however, Shishito, Habanero, and Red Fresno Peppers continue to be in the shortest supply.

Table Grape supplies are steady this week, and quality is outstanding on the new crop out of California.

The market remains active but supplies and quality have improved. Disease and insect pressure will continue to reduce harvestable acreage; however, supplies are currently at steady levels for most commodities. Growers anticipate these challenges will remain a significant factor impacting supplies throughout the season, with **Lettuce, Broccoli, and Cauliflower** availability expected to remain difficult throughout the summer months. Broccoli and Cauliflower supplies have improved this week, but we will keep these items on the watchlist.

As temperatures increase in Salinas, these items could be impacted. **Artichokes** and **Anise, Fennel** remain in limited supply and at the extreme trigger due to ongoing supply constraints.

The **Avocado** market remains stable as production from Mexico, California, and Peru continues to provide ample supply to meet current U.S. demand. Mexico is now primarily harvesting the Flor Loca crop, and we are seeing a shift in the size profile toward smaller fruit. California production is slowly starting to taper off but will continue to provide meaningful supplies through July and early August. Peru is expected to maintain good volume throughout the summer.

Melon availability has improved; Cantaloupes currently have better supplies, while **Honeydew** volume is expected to increase in the coming weeks.

EXTREME				
	Artichokes	Asparagus	Celery Organic	Fennel/Anise
				
	Blackberries	Cantaloupe	Cilantro	
ESCALATED				
	Green Beans	Honeydew	Limes 175's and larger	
				
	Sugar Snap & Snow Peas	Tomatoes Grape & Cherry	White Asparagus	
WATCHLIST				
	Broccoli	Brussels Sprouts	Cabbage Green	
				
	Cauliflower	Herbs	Small Citrus all varieties	

Berry markets remain generally stable as California production continues to offset seasonal transitions occurring across the country. **Strawberry** and **Rasperry** supplies continue to support consistent market coverage, while **Blueberry** availability remains stable as Pacific Northwest production ramps up. **Blackberries** remain the tightest category in the near term; however, California harvests are expected to improve steadily over the coming weeks. Overall, quality remains strong across all Berry categories, with regional production transitions continuing to drive short-term market conditions.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including **Lemons, Navels, and Valencias**, with fruit generally trending larger. Some suppliers are holding averages on Lemons. California Valencias are in full swing, with Navels winding down. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. **Grapefruit** supplies are currently stable.

FRUITS & VEGETABLES

Avocados: Mexico sent 37.5 million pounds to the U.S. last week, most of which was the Flor Loca crop and the dry matter has dropped from 36% from the main crop, to 26% with Loca. California harvested 11.3 million pounds and has an average dry matter of 29%. Peru sent 10.5 million pounds with dry matter around 25%. The Mexican Flor Loca crop will be the main fruit we see in the U.S, and we will see a shift with the size profile favoring smaller fruit and a brighter green skin appearance.

Table Grapes: We have completely transitioned to California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead and there may be supply issues on the back end of the season.

BERRIES

Strawberries: Strawberry supplies remain centered in Watsonville and Salinas as the Santa Maria season has concluded, with production expected to resume later in July. Overall fruit quality continues to improve across both conventional and organic programs, with fewer defects reported, though occasional bruising, soft skin, and albino fruit remain. Harvest volumes are expected to decline approximately 25% over the next week as the current production cycle slows. Despite the lighter supply, overall quality remains favorable and should continue to support customer demand.

Blackberries: ESCALATED Blackberry supplies remain limited as Mexico has no available production, and California continues its seasonal ramp-up. Watsonville quality remains good, with conventional fruit showing excellent size and flavor, while organic production continues to develop following cooler-than-normal weather. Conventional volumes are expected to gradually increase toward the end of July, with organic harvest anticipated to begin during the first week of August. Market availability should improve as California production continues to build over the coming weeks.

CITRUS

Limes: ESCALATED Supply continues to improve despite heavy rains in Mexico, but sizing issues persist on fruit out of Mexico and Central America; the size distribution will continue to skew heavy to 230 ct and 250s. This is leaving larger sizes such as 175s and larger extremely tight. We are also seeing moderate pressure on quality with imperfections such as oleocellosis. Markets are expected to remain firm with the World Cup taking place in the United States expected to keep summer demand higher than normal. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next few weeks.

Lemons: 140/165/200's are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve. There are also averages in place.

Bananas: Banana supply will be stable, but production curtailed due to virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program. Bunker rates will be released this week and next, expect them to be higher due to rising fuel costs.

Pineapples: The Pineapple market has improved and volume from Costa Rica has increased over the last 2 weeks. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, the quality and taste are good.

Blueberries: Blueberry production continues its seasonal transition as Mexican supplies decline while California and the Pacific Northwest increase harvest activity. Quality remains excellent across domestic growing regions, with strong bloom, flavor, and overall fruit condition being reported. Pacific Northwest production continues to build, with Oregon well into production and British Columbia now harvesting, helping offset the seasonal decline in Mexico. Overall availability is expected to remain stable as domestic production continues to increase.

Raspberries: Raspberry supplies remain favorable, supported by peak production in Mexico and improving harvest activity in Watsonville. Fruit quality remains strong across both regions, with excellent color, firmness, flavor, and overall appearance being reported. Mexican production is expected to remain at peak levels through July, while California volumes continue to increase as the season progresses gradually. Overall availability and quality are expected to remain strong throughout the remainder of the month.

Navels: Manifest is peaking on 72/88's. Extremely tight on 113's and 138's. This is also putting pressure on the 88's – be prepared to be offered 72's on many orders.

Valencias: California Valencias have begun and are projected to have issues on sizing.

Mandarins: Mandarins are finishing up and imports are coming in. Be in contact with your supplier on other varieties or imports as alternative options.

Grapefruit: California Grapefruit available!

WEST COAST LETTUCE

Iceberg: Lettuce quality is good; supplies remain limited but are improving.

Iceberg VA: Quality is good; supplies remain limited but are improving. We have seen reports of short shelf life, insect pressure, and mildew in bags.

Romaine VA: Quality is good and supplies are improving. We are still seeing more core in the bags and some mildew.

Romaine & Romaine Hearts: Supplies and quality are good. Romaine Hearts remain at the extreme level.

Boston/Butter Lettuce: Quality and supplies look good.

Green Leaf, Better Burger and Red Leaf: Quality and supplies are good.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Supply is steady out of South Georgia and South Carolina in the East and Arvin in the West. Quality is good out of all regions.

Color Bell Pepper: Good supply available out of Coachella and South Georgia this week. Quality is outstanding on open-field varieties. The Hot House Pepper category is steady out of Canada and Mexico. Overall, quality is good.

Jicama: Stable supply and good quality available.

Mini Sweet Pepper: Supply will be stable over the next week. Quality remains good.

Mixed Chili Pepper: Supplies stable on most varieties. Decent numbers crossing from Mexico; Coachella and South Georgia are ramping up. Markets remain very short on Habanero, Fresnos, and Shishito; for Fresnos, we recommend subbing to Red Jalapeno.

Tomatillo: Good supply and quality available this week.

Eggplant: Central Valley is now in full production out of California. Quality is fair. We are mostly seeing Choice available, with #1 Fruit being limited. Local programs in the east-Tennessee, North Carolina and Michigan- Limited this week.

English Cucumbers: Excellent supply out of Canada, Nogales and McAllen. Quality is good.

Slicer Cucumbers: Supply crossing through Nogales and McAllen will tighten up as the season starts to close. In the east we are seeing good supply out of Florida and South Georgia. Quality is good from all shipping points.

Pickles: Lighter supply available out of South Georgia, Florida, and Mexico. Quality is good.

Green Beans: ESCALATED Lighter supply out of South Georgia and Kentucky in the East. In the West, Brentwood and Baja supplies are limited. Quality remains inconsistent.

French Beans: Supplies continue to improve as Guatemalan production increases, helping ease market conditions. Both organic and conventional supplies from Guatemala are readily available, while conventional production from Mexico also remains good.

Zucchini/Yellow Squash: Steady supply on green and yellow out of South Georgia and Fresno. Quality is good.

MELONS

Watermelon: The market has improved slightly as new growing areas out east have started harvesting. Production in the west has also increased but is still below levels from last year. Pricing remains elevated but should start to cool off, has more growing regions up north come on and demand levels off.

Cantaloupe: ESCALATED California production finally saw a significant increase, and the market has almost returned to normal. Suppliers are reporting good sizing, strong external appearance and an excellent flavor profile. Production is expected to remain strong, moving forward. There are still some suppliers with limited availability in AZ, but they will make their way to California in the next couple of weeks.

Honeydew: ESCALATED Honeydew production is gradually increasing, but not fast enough yet to fully recover from the previous shortage. Available sizing is primarily 5s, 6s are limited and 8s are hard to find. Overall pricing is still holding firm, but quality has been good.

HERBS

WATCHLIST Supplies remain generally steady this week, with basil continuing to report good production, quality, and availability. Most herb varieties are seeing stable market conditions, although oregano quality from Colombia has been impacted by rainfall, while chervil and marjoram remain limited due to recent heat. Overall availability remains favorable across the category, with only a few weather-related challenges affecting select items.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Steady	Steady	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	USA/MEX
Cilantro	Steady	Steady	Costa Rica
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Good	USA/MEX
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA/MEX
Savory	Steady	Steady	USA
Sorrel	Steady	Steady	USA
Tarragon	Limited	Steady	MEX
Thyme	Steady	Steady	USA/MEX
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

MIXED VEGETABLES

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated. 12ct's remain at the extreme trigger.

Asparagus: EXTREME The asparagus market remains active, with demand exceeding available supply. Northern Peru remains the primary production region and is expected to support the market through the first half of August before the normal seasonal transition to Southern Peru begins. Mexican production remains very light and is expected to stay that way through the remainder of the month, keeping the industry heavily reliant on Peruvian supplies. While the seasonal transition is expected to be temporary, it may create short term supply gaps until southern production reaches full volume.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality and supplies are good. A few reports of browning and pin rot continue. Organic Crowns remain at the extreme level. With insect pressure increasing, we will keep this item on the watchlist.

Brocolini and Sweet Baby Broccoli: Quality is good, but supplies are limited.

Brussels Sprouts: WATCHLIST Quality and supplies have improved.

Carrots: (JUMBOS, MEDIUMS and CELLOS) Quality and supplies are good.

Cauliflower: WATCHLIST Quality and supplies are good. With insect pressure increasing, we will keep this item on the watchlist.

Celery: Quality and supplies have improved. Disease pressure is still a factor, especially on organic celery but overall quality and supplies look good. Organic Celery is still at the extreme level.

Corn, Sweet: Lighter supply going into the holiday out of South Georgia in the east and Brentwood out west. We expect higher demand and higher market pricing through mid-July. Quality is good out of all regions.

Fennel: EXTREME Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

Kale: Quality and supplies look good.

Leeks: Quality and supplies look okay.

Garlic: Quality remains good although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and market are steady.

Green Cabbage: WATCHLIST Supplies and quality are good.

Green Onions: Supplies and quality are good.

Mushrooms: Supply is expected to be steady for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years, Canadian mushroom farmers received unfair subsidies, giving them a clear advantage over the domestic mushroom farming industry. The USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62–4.97%. These duties will be applied once the ruling is formally published. This will not only increase the price of imported mushrooms from Canada but will also put upward pressure on the price of domestically grown product as well. This is something domestic growers have been seeking for some time to support increases in their operating costs over the past five years.

Napa Cabbage: Quality and supplies have improved.

Parsley (Curly, Italian): Quality and supplies are good.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

Red Cabbage: Quality looks good, but supplies are light.

Spinach: Supplies and quality look good.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: ESCALATED Snow pea and sugar snap pea supplies continue to improve as Guatemalan production increases, with availability expected to strengthen each week. Domestic sugar snap supplies remain fair, while snow pea availability continues to be somewhat lighter. Overall market conditions are improving as additional Guatemalan volume enters the market, providing better coverage and supporting more consistent availability.

ONIONS:

New Mexico volume has dropped off as suppliers deal with lower yields and seeder issues. California suppliers are also dealing with low volume as they work through transition challenges. Issues in both regions are leaving the market limited on all sizes and colors, and pricing has jumped quickly. Production is expected to pick up in a few weeks.

POTATOES:

The market has strengthened as the size profile shifts to finish out last year's crop. Suppliers are seeing a shift toward smaller count sizes (70–120 ct) while 40–60 ct have become tighter. Suppliers are watching inventories closely to make sure there is enough to last until new crop. Shippers are requesting additional lead time and some flexibility on sizing when possible.

SWEET POTATOES:

The Sweet Potato market has tightened as the industry moves into the final stretch of the 2025 storage crop. Limited supplies remain available nationwide, but inventories are gradually declining, particularly on premium U.S. No. 1 grades and larger counts. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market heading into summer. North Carolina and Mississippi growers are reporting lighter yields and tighter availability due to weather-related challenges from last season. Quality remains generally good; however, some lots are showing increased cosmetic defects and shrink tied to weather stress from last growing season. New crop harvest is expected to begin in limited volumes during August, with broader availability arriving in September.

TOMATOES: MEXICO

Round Tomatoes: Supply will remain snug on larger-sized fruit this week. Quality is outstanding on what is crossing this week.

Roma Tomatoes: Excellent supply and quality available out of Jalisco and Baja.

Grape Medley, Grape and Cherry Tomatoes: ESCALATED

Grape Tomatoes and Cherries are very short this week due to lighter harvesting and higher demand. Medleys seem to be readily available. Quality on what is crossing the border has been good across all varieties.

TOMATOES: CALIFORNIA

Supply continues to improve with steady availability across the Golden State. Crops look amazing; we expect a great California season on vine ripens as well as mature greens.

OTHER FRUIT:

Apples: As we move through the summer storage season, Washington apple inventories continue to trend below both last year and historical averages across many key varieties, supporting the firm pricing environment that has developed throughout 2026. According to the most recent storage reporting, total conventional apple inventories stood at 39.4 million cartons, down 12% from 44.9 million cartons last year and slightly below the three-year average of 40.4 million cartons. The market will remain elevated until new crop apples start in August.

Pears: D'Anjou availability is tight and primarily limited to U.S. #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. Red D'Anjou Pears are moderately available in U.S. #1 35-55ct sizes and should remain in the market for another month, with new crop Starkrimson Pears expected to start mid-August. Both Bartlett and Bosc Pears are currently gapping until their respective new crop harvests in mid-August and early September.

TOMATOES: EAST COAST

Round & Roma Tomatoes: Volume is steady this week out of Tennessee and North Carolina. Quality is mixed out of all regions.

Grape Medley, Grape and Cherry Tomatoes: ESCALATED

Lighter volume this week on grapes, medley, and cherries due to transition and higher holiday demand. Quality is fair at best.

Pomegranate: Limited supply out of Mexico.

Asian Pears: Lighter volume, good supply on larger sizes.

Cherries: Good supply out of Washington State. NEW CROP.

Stone Fruit: Steady supply out of California and other local regions.

Papaya: Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

Kiwi Fruit: Supplies fair out of California as well as offshore landing on the East Coast.

Mangoes: Steady supply out of Mexico, Peru and Puerto Rico. Varieties: Tommys, and Ataulfo.

Kiwi Fruit: Supplies are fair out of Chile.

Quince: Limited supply available this week.

