



# Fresh News

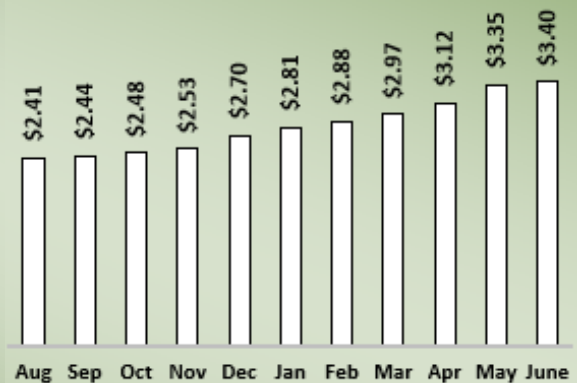
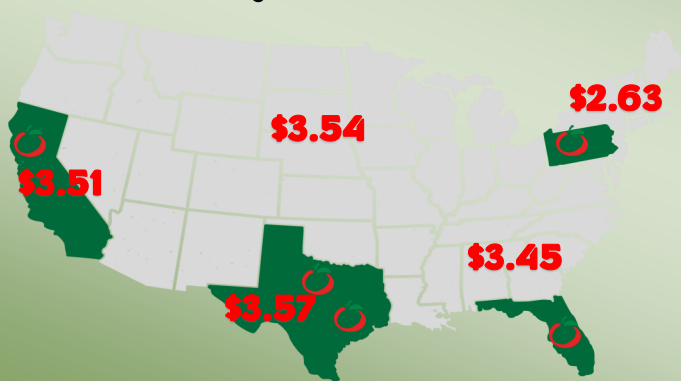
## Market Alert

- Avocados
- Blueberries
- Carrots
- Lemons
- Oranges
- Cucumbers
- Iceberg
- Lettuce Leaf
- Cantaloupe
- Onions
- Pineapple

The current produce market is defined by regional transitions, weather-driven supply interruptions, disease pressure, and uneven sizing across several key categories. Lettuce, cantaloupe, blueberries, lemons, limes, avocados, celery, carrots, and select peppers remain the most sensitive commodities. Demand continues to exceed available supply in several categories, while contracts, lead time, and sizing flexibility are critical to maintaining service levels. Freight remains a contributing cost factor, especially out of major growing regions where supplier delays and truck capacity pressure continue to impact movement.

## National Reefer Rate per Mile (Last Week per DAT)

## Trend



## Weather Alerts

REGION	SAT JUN 14	SUN JUN 15	MON JUN 16	TUE JUN 17	WED JUN 18	THU JUN 19	FRI JUN 20
<b>RUSKIN FLORIDA</b>	Scattered Thunderstorms 90° / 74°	Partly Cloudy Isolated Shower 90° / 74°	Partly Sunny Hot & Humid 91° / 75°	PM Thunderstorms Possible 90° / 75°	Scattered Showers & Storms 88° / 74°	Partly Sunny Hot & Humid 90° / 75°	Thunderstorms Possible 90° / 75°
<b>MCALLEN TEXAS</b>	Mostly Sunny 96° / 75°	Hot, Partly Cloudy 97° / 77°	Mostly Sunny 98° / 77°	Sunny and Hot 99° / 77°	Partly Sunny Slight Storm Chance 96° / 77°	Hot and Humid 97° / 77°	Mostly Sunny 98° / 77°
<b>CULIACÁN SINALOA, MEXICO</b>	Sunny 98° / 70°	Mostly Sunny 99° / 71°	Sunny Hot 100° / 72°	Sunny Sunny 100° / 72°	Sunny Hot 99° / 72°	Mostly Sunny 98° / 72°	Slight Cloud Cover 97° / 71°
<b>SONORA (HERMOSEILLO REGION) MEXICO</b>	Sunny Very Hot 106° / 66°	Sunny Very Hot 106° / 67°	Sunny Very Hot 107° / 69°	Sunny Very Hot 107° / 70°	Sunny Very Hot 106° / 69°	Sunny Very Hot 105° / 69°	Mostly Sunny 104° / 68°
<b>FIREBAUGH CALIFORNIA</b>	Sunny Hot 94° / 60°	Sunny Hot 95° / 61°	Sunny Hot 96° / 62°	Sunny Hot 97° / 63°	Sunny Hot 98° / 63°	Sunny Very Hot 99° / 64°	Mostly Sunny 100° / 65°
<b>WATSONVILLE CALIFORNIA</b>	AM Clouds PM Sun 67° / 52°	Partly Cloudy 69° / 52°	Mostly Sunny 70° / 53°	Sunny Sunny 72° / 54°	Sunny 73° / 54°	Mostly Sunny 73° / 54°	Partly Cloudy 73° / 55°

# Tomatoes



## Domestic

The North American tomato market is currently experiencing a significant seasonal transition as production shifts from Florida and South Georgia into South Carolina, Tennessee, North Carolina, California, Baja California, and Central Mexico. While overall supplies remain available, regional gaps have developed in the Eastern United States, creating increased dependence on Western and Mexican production. Quality remains generally favorable across most growing regions; however, supply remains uneven and freight continues to influence delivered costs.

The market outlook for the balance of June remains cautiously optimistic. Eastern production remains limited until North Carolina and Tennessee fully ramp up in July, while California and Baja are expected to provide increasing relief throughout the coming weeks. Mexico continues to play a critical role in stabilizing overall North American supply.

### Eastern United States

#### Florida

Florida production is rapidly approaching seasonal completion. The Ruskin and Palmetto districts, which have supplied significant tomato volume throughout the spring season, are now winding down. Harvest volumes continue to decline weekly, resulting in reduced availability of round, roma, and grape tomatoes. Quality remains acceptable; however, reduced production and field age are creating more variability than seen earlier in the season. Florida's contribution to overall market supply is expected to diminish significantly over the next several weeks.



#### South Carolina

South Carolina has become the primary transition region for Eastern tomato production. New acreage has begun harvesting with favorable quality characteristics and strong sizing profiles. Round tomatoes from South Carolina are showing excellent quality with multiple size options available. Roma production is helping bridge the supply gap left by Florida, although acreage remains lower than historical averages. Grape tomato production continues to increase as additional fields enter harvest. Weather interruptions have occasionally slowed harvesting activity, but overall crop conditions remain favorable. South Carolina is expected to carry a significant portion of Eastern demand through June.

#### Georgia

South Georgia remains active but at substantially reduced acreage compared to previous seasons. Limited production is contributing supplemental volume to Eastern markets but is insufficient to replace Florida's declining output.

Growers continue to report acceptable quality; however, overall supply remains restricted. Georgia's role will primarily be supplemental until larger summer regions begin production.

#### Tennessee and North Carolina

Tennessee and North Carolina are expected to become major contributors beginning in early July. Current field conditions indicate promising production potential, and these regions are anticipated to restore balance to Eastern tomato supplies once harvests begin in earnest. Until then, the East remains vulnerable to temporary supply gaps and market fluctuations.



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## Western Domestic Tomato Market

### California

California has begun harvest operations in a limited capacity, with only a small number of growers actively shipping. Current production remains light, but acreage throughout the San Joaquin Valley and Fresno districts is expected to increase steadily during June and early July. California will become increasingly important in stabilizing both Eastern and Western markets as production expands.



#### *Round Tomatoes*

California round tomato production remains light but is expected to accelerate rapidly through late June. Early quality reports are favorable, with strong color, firmness, and sizing.

#### *Roma Tomatoes*

California roma production is expected to begin meaningful harvest activity within the next several weeks. This additional volume should significantly improve market stability and provide buyers with greater sourcing flexibility.

#### *Grape Tomatoes*

California grape tomato production remains limited but is expected to increase as more acreage enters production throughout the summer season.

## Mexico

Mexico continues to be the most important stabilizing force in the North American tomato industry during the current transition period.

### Sonora

Sonora remains active but is entering the final stages of its seasonal cycle.

Production volumes continue to decline weekly as fields approach completion. Quality remains acceptable, though fruit sizing has become smaller and overall yields are decreasing.

Most industry participants expect Sonora shipments to continue for only a few more weeks before transitioning fully into Baja and California production.



### Baja California

Baja represents the most significant growth opportunity for summer tomato supply.

New fields are entering production weekly, and growers report improving volumes across multiple tomato categories. Early harvests have produced larger fruit sizes with fair-to-good quality.

As additional acreage reaches maturity, Baja is expected to become one of the dominant tomato-producing regions in North America during the summer months.

### Baja Outlook

Increasing production each week

Good quality on newer fields

Strong size profile

Expected market stabilizer through summer

### Central Mexico

Central Mexico continues to provide steady tomato volume across several categories.

Production remains relatively stable with acceptable quality and consistent availability. While Central Mexico is not producing peak seasonal volume, it remains an important component of overall supply continuity.



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# Fruits

## *Apples*

The apple market remains generally stable, but size availability is becoming increasingly important. Washington fruit continues to skew toward medium and large sizes, while smaller counts remain limited, especially on Gala and Granny Smith. Gala production is reported below prior-year levels, and small 125/138 count fruit is difficult to secure. Granny Smith is also peaking large with very limited small-size availability and fewer substitution options. Fuji and Pink Lady may serve as alternatives where customer specifications allow. Overall, pricing is steady to firm, and buyers should plan ahead on small fruit.



production and gradual domestic increases. Mexico remains a key supply source, although volumes are beginning to decline week over week. Central California and Georgia are starting to add limited domestic availability, which should improve by mid-June. Demand has eased somewhat, helping keep the market manageable. Quality remains generally good, though warmer conditions in Mexico may affect berry size and firmness.

## *Bananas*

Banana supply remains steady and serviceable, with reliable shipping and balanced market conditions. Current availability is meeting demand, and pricing remains stable in the near term. However, production remains exposed to longer-term pressure from virus concerns, lower yields, and rising input costs. Programs should maintain consistent ordering patterns to avoid volatility and protect continuity of supply. Quality is currently good, but proactive communication with suppliers remains important.



## *Blueberries*

**ALERT**



Blueberries are one of the more sensitive fruit categories. Central Mexico is finishing, East Coast production is light, and California is not producing enough volume to fully offset the gap. Pacific Northwest harvest has begun lightly, but meaningful volume is not expected until later in June. This creates a short-term supply gap, with contracts prioritized and open-market fruit limited. Quality remains good where fruit is available, but pricing is expected to strengthen until new regions ramp up.

## *Blackberries*

Blackberry markets are stable, supported by ongoing Mexican



## *Raspberries*

Raspberry availability is gradually improving as California production begins to build and Mexico remains active. Watsonville harvest has started, though volumes remain lighter than peak levels. Quality is strong, with good color, firmness, and flavor reported across conventional and organic



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## Strawberries

Strawberry supplies remain somewhat constrained following weather-related harvest delays. Recent rain and cooler temperatures slowed ripening and reduced harvestable volume, especially in Salinas. Quality is generally good, with occasional bruising, overripe fruit, smaller sizing, and isolated defects. Production is expected to improve as weather stabilizes, but lower yields may remain a factor through parts of the summer. Markets are slightly higher and should be managed with realistic lead time.



ity and import cost structure. Customers should allow lead time and remain flexible on pack and size.

## Limes

Lime supply is improving as more Mexican volume crosses the border, but sizing remains imbalanced. Smaller fruit, especially 230s and 250s, is more available, while larger sizes such as 175s and larger remain tight. Rain may temporarily slow harvesting and contribute to quality variability, including surface defects. Pricing is expected to ease gradually, but larger fruit will likely remain firm until size distribution improves later in the season.



## Grapefruit

California grapefruit is available, with Star Ruby fruit shipping from Riverside and the San Joaquin Valley. Sizing is reported to peak around 48 count. Texas production is largely winding down, leaving California as the primary source. Overall availability is steady but not excessive, and customers should remain flexible on sizing. Quality is good, and the market is generally stable compared with tighter citrus categories such as lemons and small oranges.



## Oranges

Valencias are now **ALERT** the primary orange variety as Navels become limited. The market is experiencing a clear size imbalance, with large fruit more available and small fruit very tight. Small-size demand remains difficult to cover, and substitutions into larger counts may be necessary. Offshore Navels are expected later in June or early July and should provide some relief. Quality remains good, but small fruit pricing should remain firm.



## Lemons

**ALERT**

The lemon market remains tight as District One finishes and Ventura/Oxnard becomes the primary domestic production region. Supplies are limited across several sizes, especially smaller fruit, and pricing remains elevated. Offshore lemons are expected in late June or early July, but early arrivals are expected to skew larger and remain priced above domestic fruit due to qual-



## Grapes

**ALERT**

The grape market remains extremely tight as the industry enters the annual transition from Mexican production to California harvests. Mexican supplies continue to decline rapidly, while California volume has not yet reached levels sufficient to fully support market demand.



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This supply gap has created significant pressure across both green and red seedless categories, resulting in elevated pricing and reduced availability.

Quality has become a growing concern throughout the transition period. As Mexican vineyards move into the final stages of harvest, shippers are reporting increased quality challenges including soft berries, shatter, dehydration, stem browning, and inconsistent sugar levels. Arrival quality is becoming more variable, requiring increased inspection and shorter inventory turns. Buyers should expect higher rejection rates and reduced shelf life compared to earlier-season product.

California's Coachella Valley harvest is underway, but volume remains limited and is being absorbed quickly by retail and foodservice demand. While California fruit is generally exhibiting stronger quality characteristics, production is still ramping up and is not yet providing adequate relief to the overall market. Additional California districts are expected to come online over the next several weeks, gradually improving supply and quality consistency.

Looking ahead, markets are expected to remain elevated through the remainder of June as California transitions into full production. Customers should remain flexible on variety, size, and origin specifications whenever possible. Advance ordering and close communication with suppliers will be critical to maintaining continuity of supply during this challenging transition period.

### *Cantaloupe*



Cantaloupes are under significant pressure due to whitefly and virus dam-

age in Arizona/Yuma. Warm February and March weather accelerated crop maturity, pulling production forward and creating an early finish. Yields are reduced, sizing is smaller, and larger fruit is especially limited. A 10–14 day supply gap is expected before California production improves. Markets are elevated, contracts are prioritized, and substitutions or sizing flexibility may be required.

### *Honeydew*



Honeydew supply is in better condition than cantaloupe. Although desert yields are somewhat lower, Mexican volume is helping stabilize the market. Quality and sizing are reported as strong in some channels, making honeydew a more promotable melon option compared with cantaloupe. Buyers should still monitor transitions, but current conditions are relatively favorable.

### *Mango*



Mango availability remains generally steady, supported by seasonal import programs. Demand is consistent, and quality is acceptable to good where fruit is properly conditioned. As summer demand increases, buyers should watch sizing, ripening stage, and arrivals closely. Flexibility on variety and size may help maintain coverage. The market is not showing the same level of disruption as melons or blueberries, but continued monitoring is recommended.

### *Pineapple*



Pineapple supply remains stable but tight. Contracts are being prioritized, and flexi-

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bility on sizing remains important. Costa Rica continues to face weather and disease-related yield challenges, affecting size distribution and overall availability. Larger sizes are gradually improving, while small and organic fruit remain more limited. Quality and eating condition are generally good, but the market is expected to remain firm through June.

### *Stonefruit*

Stonefruit is entering stronger seasonal availability as California production improves. Apricots and cherries are listed among peak June items, and broader stonefruit movement should continue to build through the month. Quality is expected to improve as more mature fields enter harvest. Buyers should monitor sizing and maturi-



ty, as early-season fruit can vary by district and variety. Promotional opportunities should improve as volume expands.

### *Watermelon*

Watermelon production is improving as South Carolina harvest gets underway. Volume is expected to increase after a brief production lull, and quality has been good. Sizing is currently concentrated around 45-count fruit. As regional programs expand, availability should strengthen, though demand may remain elevated due to seasonal summer consumption. Buyers should continue to monitor freight and regional harvest timing.



## *Vegetables*

### *Asparagus*

Asparagus markets have eased due to strong supply from Mexico, domestic regions, Canada, and Peru. Availability is slightly above demand, and quality is consistent. However, domestic production is beginning to taper, and the market may firm by late June as imports take on a larger role. Freight cost remains a factor, especially in California. Buyers should take advantage of current availability while watching for late-June tightening.



is increasing shipments. Mexico's Flora Loca crop is expected to build, which should provide additional relief later in June and July. Current fruit quality is strong, but ripening behavior varies by crop due to differences in dry matter and oil content. Pricing remains elevated and inconsistent, so close supplier communication is necessary.

### *Avocados*

Avocados remain volatile but are beginning to stabilize. Mexico's main crop is winding down, while California remains active and Peru



### *Bell Peppers*

**ALERT**



Bell pepper supplies are improving as South Georgia production increases and California transitions into Bakersfield/Central Valley production. Green pepper demand remains strong, keeping supply somewhat tight. Red and colored bell pepper availability is improving in California, while Georgia supplies remain limited on some

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sizes. Additional South and North Carolina production should provide relief later in June. Quality is good overall, but sizing and grade flexibility may be required.

### *Broccoli*



Broccoli supplies are steady and improving as Salinas and Santa Maria production strengthens. Quality is improving after prior inconsistencies, and demand remains good but manageable. Markets are expected to gradually ease as volume stabilizes. Broccolini supply is also improving, helping reduce pricing pressure. Overall, broccoli is in a more favorable position than lettuce and celery.

### *Brussels Sprouts*



Brussels sprout production remains somewhat limited, although quality is generally good. Some reports indicate availability and pricing are stable, while others continue to list Brussels sprouts among watch or alert items due to limited supply through June. Markets may edge higher if demand strengthens or supply fails to improve. Buyers should continue to provide lead time and avoid assuming full open-market availability.

### *Cabbage*



Cabbage supply is steady, with strong yields and good quality from Central California. Demand has increased, but pricing remains mostly stable. Green cabbage is watch-listed in some reports, while red cabbage is noted as escalated. The Central California transition should continue to support availability. Buyers should monitor color-specific supply, as red cabbage may remain tighter than green.

### *Carrots*

**ALERT**



Carrots remain an alert category, although conditions are improving. Bakersfield, Coachella, and the Imperial Valley are key production areas, with warmer temperatures helping crops size up. Baby carrot availability has improved, but jumbo and cello carrots remain limited due to smaller sizing. Fill rates should continue to improve over the next couple of weeks, but full normalization will take time. Pricing remains supported on constrained sizes.

### *Cauliflower*



Cauliflower supplies are steady to strong, with good availability from Salinas and Santa Maria. Quality has improved after earlier weather impacts, and production is consistent. The market is expected to remain stable into the near term. Cauliflower is currently one of the more balanced vegetable categories, with adequate supply and manageable demand.

### *Celery*



Celery remains elevated and somewhat constrained. Supplies are light, and demand continues to pressure the market. Production is centered in Oxnard/Santa Maria and transitioning into Salinas, which should gradually improve availability. Quality is fair to good depending on shipper, but value-added products may continue to see slight price increases. Buyers should expect limited availability and firm pricing in the near term.

### *Cucumbers*



Cucumber markets are transitioning. Sonora production is winding down while Baja ramps up. In the East, Georgia remains a major source, but retail sizes are tight due to earlier weather impacts. North Carolina has started lightly and should improve availability over the next

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one to two weeks. Western quality should improve as newer Baja fields reach stronger production. Overall supply is stable but requires regional flexibility.

### *Eggplant*

**ALERT**



Eggplant supply remains limited in the East, with Plant City winding down and Georgia slow to ramp up. Quality is mixed, and availability is lighter than normal. In the West, California is transitioning from desert production into Fresno, which should gradually strengthen supply and stabilize quality. Central Mexico is providing minimal supplemental volume. Choice fruit is more available than #1 grade, so buyers should manage grade expectations.

### *Garlic*



Garlic remains a featured commodity in the June market reports. Supply is generally available, but freight and regional transitions continue to influence delivered cost. Quality is steady overall. Buyers should monitor domestic and import availability as summer demand develops. No major shortage is indicated, but advance planning remains important due to transportation pressure across growing regions.

### *Green Onions*



Green onion supplies are improving weekly, primarily from Mexico. Availability is trending positively, and gradual price relief is expected. Quality is improving as supply becomes more consistent. Buyers should continue monitoring border movement and transportation lead time, but the category appears to be moving toward better balance.

### *Green Beans*



Green bean conditions vary by region. Eastern supplies are steady, with good quality

and balanced demand, keeping pricing stable to slightly lower. Western supplies remain tighter due to transition gaps and acreage shifts, resulting in elevated and more volatile markets. Desert production should gradually improve availability. Foodservice-preferred grades may remain uneven in sizing and availability.

### *Kale*



Kale remains on the extreme alert list due to tight supply and market pressure. Disease, weather stress, and reduced harvestable acreage across leafy vegetable regions are contributing to limited availability. Quality may vary by shipper, and buyers should expect firm pricing and possible prorates. Kale should be managed with the same caution as other leafy green categories.

### *Lettuce – Iceberg*

**ALERT**



Iceberg lettuce remains one of the most volatile categories. Salinas Valley yields are below normal due to soil-borne disease, INSV pressure, and weather-related stress. Demand continues to exceed supply, and markets remain historically high. Heads are lighter and smaller, and shelf-life concerns may occur. Prorates should be expected, and no immediate major improvement is projected.

### *Lettuce – Leaf*

**ALERT**



Leaf lettuce remains extremely limited, particularly green leaf and red leaf. Mildew, fringe burn, light weights, and reduced yields are affecting supply. Demand exceeds available volume, keeping prices elevated. Some easing may occur with reduced school demand and improving summer conditions, but near-term availability remains challenging. Buyers should expect substitutions, prorates, and quality varia-

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bility.

### *Lettuce – Tender Leaf*

Tender leaf supplies are steadier than iceberg and leaf lettuce, with improving quality as production shifts into Central California. Reduced insect pressure is expected to ease market conditions. While not as pressured as romaine or iceberg, tender leaf should still be monitored due to the broader leafy-green market volatility. Availability is improving, but lead time remains recommended.



### *Onions*

Onion supply is transitioning from Texas, Georgia, and California desert programs into California Central Valley and New Mexico. All colors and sizes are available, and quality remains strong. Market prices have decreased slightly, though freight is a key driver of delivered cost. Buyers should monitor origin and freight lanes closely. Overall, onions are in a stable-to-improving position.



### *Chili Peppers*

Chili pepper supply is generally in good condition as production shifts from Plant City to Georgia and as Mexico, Baja, and early California support western demand.



Most varieties are adequate, though poblanos, habaneros, Fresnos, and shishitos may be tighter. Quality is steady overall. Availability should improve as Baja and California production increase.

### *Potatoes*

Idaho is currently shipping Burbanks, with slightly higher prices but ample overall supply. Supply is expected to remain available until Norkotah begins in early September. The 2026 crop was planted earlier than normal, with acreage reduced due to prior oversupply. Favorable weather and irrigation support solid production potential despite reduced acreage. Fingerlings are experiencing a short-term 4–6 week supply gap.



### *Squash – Yellow and Zucchini*

Squash supplies are improving in the East as Georgia, North Carolina, and New Jersey ramp up with newer fields and better quality. In the West, Sonora is finishing zucchini and has ended yellow squash, while Baja zucchini is increasing. Yellow squash remains more limited. California has started in Fresno and Santa Maria, though minor rain impacts have occurred. Zucchini is a stronger option than yellow squash in the near term.



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# Freight Update

## Freight Market Update – June 2026

The transportation market starting to stabilize compared to the volatility experienced during the past several years; however, produce-growing regions continue to face capacity constraints due to seasonal demand, elevated operating costs, and supplier loading delays. Freight availability is generally adequate across most major produce corridors, but securing trucks with sufficient lead time remains critical, particularly for temperature-controlled freight.

## National Transportation Conditions

National freight conditions have softened slightly, with the overall truck market described as flat to slightly lower. Despite this moderation, produce regions continue to experience localized capacity challenges, particularly in California, Arizona, Florida, and the Southeast. Refrigerated equipment remains the most sensitive segment of the transportation market due to concentrated produce harvest activity.

## Fuel and Transportation Costs

Fuel remains one of the largest contributors to freight expense.

National Diesel Average: \$5.35 per gallon

National Fuel Surcharge: \$0.72 per mile

Fuel costs remain substantially higher than the prior year, continuing to pressure trans-

portation budgets and delivered produce costs.

Many carriers continue implementing fuel surcharge adjustments, including both over-the-road and ocean freight providers. These increases are being reflected in delivered produce pricing throughout the supply chain.

## Expected Trends

- Freight rates remain mostly elevated.
- Refrigerated capacity should remain adequate.
- California demand will increase as summer crops ramp up.
- Southeast demand will strengthen as North Carolina and Tennessee production begins.
- Fuel costs will continue supporting elevated transportation expenses.
- Produce shippers with advanced planning will have the greatest success securing competitive rates.



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## Flowers—Every Day Program

- Fixed pricing programs
- Various price points focused on shopper demographics
- Customization capabilities



## DiMare Fresh Locations



**Dallas/Fort Worth**  
4629 Diplomacy Rd  
Fort Worth, TX 76155  
Tel. 817-608-0010



**Houston**  
9221 Park South View  
Houston, TX 77051  
Tel. 713-688-0278



**Scranton**  
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Scranton, PA 18505  
Tel. 570-342-3121



**Tampa**  
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