Fresh News

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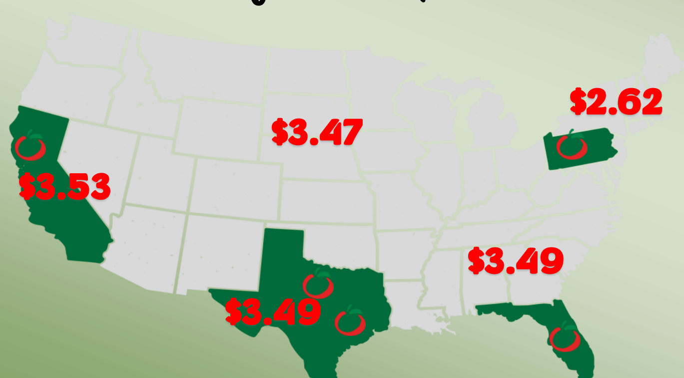
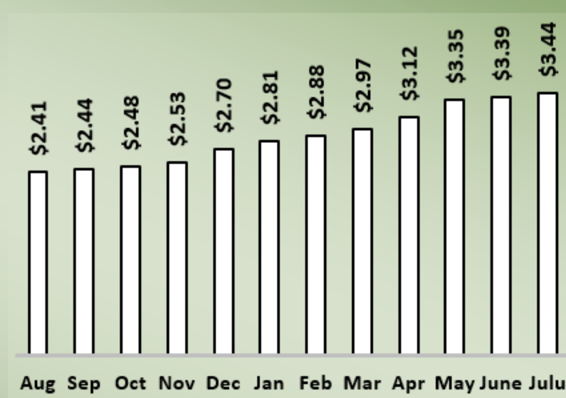
The North American fresh produce industry continues to navigate a dynamic summer transition as production shifts from desert growing regions into California, the Pacific Northwest, the Midwest, and the Eastern United States. Seasonal transitions, localized weather events, elevated production costs, and transportation expenses continue influencing availability across numerous commodities. While overall produce availability has improved compared with early June, several categories remain under supply pressure due to delayed harvests, reduced yields, quality concerns, and ongoing regional transitions.

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



Trend



Weather Alerts

7-DAY REGIONAL WEATHER OUTLOOK *July 12 – July 18, 2026*	SUN JUL 12	MON JUL 13	TUE JUL 14	WED JUL 15	THU JUL 16	FHI JUL 19	FRT JUL 17	SAT JUL 18
RUSKIN FLORIDA	Scattered Thunderstorms 92° / 75°	Scattered Thunderstorms 92° / 75°	PM Thunderstorms Likely 92° / 75°	Partly Sunny Hot & Humid 93° / 76°	Scattered Storms 91° / 75°	Scattered Storms 91° / 75°	Isolated PM Storms 91° / 75°	Partly Sunny Hot & Humid 91° / 75°
MCALLEN TEXAS	Mostly Sunny Very Hot 99° / 77°	Sunny Very Hot 100° / 78°	Mostly Sunny Very Hot 101° / 78°	Sunny Very Hot 102° / 79°	Mostly Sunny Very Hot 101° / 78°	Sunny Very Hot 101° / 78°	Sunny Very Hot 101° / 78°	Mostly Sunny Very Hot 102° / 79°
CULIACÁN SINALOA, MEXICO	Sunny Dry & Hot 98° / 72°	Sunny Very Hot 99° / 74°	Very Hot Low Humidity 101° / 74°	Very Hot Low Humidity 101° / 75°	Mostly Sunny Hot 100° / 74°	Sunny Hot 100° / 74°	Sunny Hot 99° / 73°	Mostly Sunny Hot 98° / 73°
SONORA (HERMOSILLO REGION) MEXICO	Very Hot Mostly Sunny 108° / 68°	Very Hot Sunny 109° / 69°	Very Hot Sunny 110° / 70°	Very Hot Sunny 110° / 71°	Very Hot Mostly Sunny 109° / 70°	Very Hot Mostly Sunny 109° / 70°	Very Hot Mostly Sunny 108° / 70°	Mostly Sunny Very Hot 107° / 69°
FIREBAUGH CALIFORNIA	Sunny Hot 100° / 64°	Sunny Very Hot 102° / 66°	Verjny Very Hot 104° / 67°	Sunny Very Hot 105° / 68°	Sunny Very Hot 105° / 67°	Sunny Very Hot 105° / 67°	Sunny Very Hot 104° / 67°	Mostly Sunny Hot 103° / 66°
WATSONVILLE CALIFORNIA	AM Clouds PM Sun 70° / 53°	Partly Cloudy Mild 72° / 53°	Mostly Sunny Mild 73° / 54°	Mostly Sunny Mild 74° / 55°	Mostly Sunny Mild 75° / 55°	Mostly Sunny Mild 76° / 56°	Sunny Mild 76° / 56°	Partly Cloudy Mild 75° / 56°

July 2026

The North American tomato market continues to strengthen as the industry transitions into its primary summer production season. Supplies are steadily improving with increased production from California, Virginia, Tennessee, North Carolina, Arkansas, Baja California, and Central Mexico. The market has shifted from the tight conditions experienced in late June, when limited regional production and strong Independence Day demand created upward pricing pressure, to a more balanced supply environment. While overall availability is improving, market conditions continue to vary considerably by tomato variety. Round and Roma tomatoes are becoming more readily available as multiple growing regions increase production, whereas grape, cherry, and other snacking tomatoes remain the tightest categories due to slower production growth and continued strong consumer demand. Quality throughout North America is generally good, supported by favorable growing conditions across most production regions, although localized weather continues to create occasional harvest interruptions and isolated quality concerns. Buyers should continue monitoring regional transitions closely, as production shifts can quickly influence availability and pricing during the summer months.

Domestic Market

Domestic tomato production has entered one of its strongest periods of the year as harvesting expands across California and the Eastern United States. California has become the dominant production region following the completion of the Florida and South Carolina seasons. Harvesting throughout the Central Valley, including the Manteca growing district, continues to increase, providing excellent availability of round and Roma tomatoes with consistently good quality. California fruit is generally larger in size, with most production concentrated in 5x6 and larger counts. While isolated cosmetic issues such as cat-facing and misshapen fruit have been reported in some fields, these defects are largely removed during packing, allowing shippers to maintain attractive, customer-ready product.

Eastern production is also expanding rapidly. Virginia has recently begun harvesting with excellent early yields, good sizing, and strong overall quality. Tennessee continues producing high-quality Roma tomatoes with exceptional packouts and larger fruit, while North Carolina and Arkansas continue increasing production to support regional distribution. These growing areas are expected to remain important suppliers throughout the remainder of July and into August, helping maintain adequate supply across both retail and foodservice channels. As additional acreage enters production, the domestic market should continue moving toward a more balanced supply position, reducing the risk of widespread shortages experienced earlier this summer.

Round tomatoes continue showing the greatest improvement in availability. Supplies have become increasingly stable as production expands across multiple regions, allowing buyers greater flexibility when sourcing product. Markets have softened modestly compared with late June as post-holiday demand normalized, although pricing remains above historical averages due to continued inflationary production and transportation costs. Quality remains very good, with good firmness, color develop-

ment, and shelf life reported across most domestic growing regions. Buyers should continue monitoring sizing, particularly for customers requiring smaller counts, as California production continues to favor larger fruit.

Roma tomatoes remain one of the most favorable tomato categories from both a supply and quality perspective. Tennessee has emerged as one of the strongest domestic suppliers, producing fruit with excellent packouts, attractive appearance, and consistent sizing. California continues supplying moderate to heavy volume, while North Carolina provides additional support for Eastern markets. Demand from foodservice remains healthy due to the versatility of Roma tomatoes for slicing, processing, sauces, and fresh applications. With production expected to continue increasing, the Roma market should remain stable through the remainder of July, with the potential for slight price decreases if favorable weather continues.

The greatest supply challenges continue affecting grape and cherry tomatoes. These categories experienced exceptionally strong retail demand leading up to the Independence Day holiday, reducing inventories throughout the supply chain. Although Virginia, Tennessee, and North Carolina are increasing production, supplies remain below seasonal expectations and continue supporting firm market conditions. California contributes additional volume, but overall availability remains limited compared with conventional round and Roma tomatoes. Snacking tomatoes continue experiencing robust demand from both retailers and consumers, particularly for convenience packaging and value-added products. Buyers should continue planning purchases several days in advance, especially when supporting promotional programs or large retail ads.

Mexico Market

Mexico continues serving as one of the most important suppliers to the United States tomato market, particularly for Roma tomatoes, specialty tomatoes, and Western distribution. Current production is concentrated in Central Mexico, Baja California, and Jalisco, where favorable growing conditions continue supporting consistent weekly shipments. Mexican production remains essential for maintaining balanced supplies while domestic growing regions continue expanding.

Roma tomatoes remain the strongest category within the Mexican market. Jalisco continues producing excellent-quality Roma tomatoes with strong packouts and reliable weekly volume. Baja also continues harvesting good-quality fruit, although production is expected to decline modestly later in July as some growers complete current fields before transitioning into newer plantings. Central Mexico continues producing moderate volumes that should remain steady to slightly higher over the next several weeks. Overall quality remains excellent, with attractive color, firmness, and eating quality supporting strong demand throughout both retail and foodservice sectors.

Round tomato production from Mexico remains moderate but dependable. Baja California continues harvesting larger-sized fruit with excellent quality, while Central Mexico provides additional supply for the U.S. market. Seasonal rainfall throughout Central Mexico has improved soil moisture and long-term

crop development but continues creating occasional harvesting delays and isolated quality concerns. Buyers may occasionally encounter fruit with minor surface scarring, softness, or uneven maturity following periods of heavy rainfall; however, these issues have not significantly affected overall market availability. Demand has moderated following the holiday period, allowing pricing to stabilize as domestic production continues increasing.

Mexican grape and cherry tomatoes remain among the tightest tomato categories. Baja continues producing limited volumes while Central Mexico provides supplemental supply. Despite improving harvest activity, overall production remains below normal due to seasonal transitions and reduced acreage. Quality continues ranging from fair to good, with fruit generally exhibiting acceptable firmness and color. Supplies are expected to improve gradually during the second half of July as additional Baja plantings begin harvesting; however, the market is likely to remain relatively firm until early August.

Organic tomato production in Mexico also remains limited. Organic Roma tomatoes continue showing reduced availability due to smaller sizing and occasional puffiness affecting packouts. Organic grape tomatoes remain in particularly tight supply as conventional snacking tomato markets continue competing for limited acreage. Improvement is expected later in July as Baja growers transition into newer fields, although supplies are unlikely to become abundant during the near term.

Market Outlook (Next 2–4 Weeks)

The tomato market is expected to continue stabilizing through the remainder of July as both domestic and Mexican production increase. Round and Roma tomatoes should experience the greatest improvement in availability as California, Virginia, Tennessee, North Carolina, Arkansas, Jalisco, Baja California, and Central Mexico maintain consistent harvest schedules. Pricing for these categories is expected to remain steady with the potential for modest declines if favorable weather continues and production expands as forecast. Grape, cherry, and organic tomatoes will likely remain the strongest tomato markets over the next several weeks. Although production is improving, supplies continue lagging behind demand, particularly for retail snacking programs and value-added packaging. Buyers should continue securing these products well in advance while maintaining flexibility regarding growing region and sizing. Weather remains the largest variable influencing the tomato market. Continued rainfall throughout Central Mexico may temporarily slow harvesting and affect quality, while excessive heat or thunderstorms across California and the Eastern United States could influence yields and field operations. Despite these potential challenges, overall market conditions remain positive, with improving supplies, favorable quality, and expanding regional production expected to provide consistent availability throughout the balance of July and into early August. Buyers should continue monitoring regional weather patterns, maintain close communication with suppliers, and plan purchases proactively to minimize the impact of localized production fluctuations. Overall, the tomato market is expected to remain well supplied for conventional round and Roma varieties, while snacking and organic tomatoes will continue requiring careful procurement strategies until additional production becomes available later this summer.

Fruits

Apples

Washington apple movement remains steady as the industry advances through the final portion of the 2025–2026 storage season. Total inventories for several major varieties remain below both prior-year and historical averages, supporting a firm underlying market. Red Delicious supplies are particularly limited compared with last year, creating concern about maintaining adequate coverage until new-crop fruit becomes available. Golden Delicious inventories are closer to normal, although smaller-count fruit may become difficult to source. Granny Smith supplies are comparatively stronger and should provide better continuity through the seasonal transition. Fuji and Pink varieties are also below prior-year inventory levels but are currently projected to bridge into new crop.

The prevailing size profile is centered on 80- and 88-count fruit, while smaller apples remain increasingly limited. This imbalance is important for school, institutional, and foodservice programs that typically require smaller counts. Demand is seasonally softer while schools are closed, but pressure on smaller sizes may intensify during August as school purchasing resumes. New-crop Wildfire Gala apples are expected to begin first, followed by Granny Smith and additional early varieties. Honeycrisp pricing has begun to ease as shippers prepare for the new crop, while Red and Golden Delicious prices have shown modest strengthening due to declining inventories. Quality remains generally good, but storage age may increase the risk of condition variability late in the season. Buyers should maintain advance orders, allow flexibility on size, and closely monitor remaining storage inventories.

Bananas

Banana supply remains generally stable, with current arrivals sufficient to meet normal retail and foodservice demand. Shipping schedules are reliable, quality is reported as very good, and no immediate widespread disruption is expected. The near-term market should therefore remain relatively balanced, with steady pricing and adequate availability for established programs.

Despite present stability, the longer-term production outlook warrants attention. Virus pressure, lower field yields, rising labor costs, and higher agricultural inputs continue to restrict production potential in major sourcing regions. Ocean-freight bunker adjustments and rising fuel expenses may also place additional pressure on delivered banana costs. Because bananas are typically managed through contracted or programmed supply, consistency in ordering is especially important. Abrupt order increases may be more difficult to cover than normal program volume. Buyers should maintain regular ordering patterns, avoid unnecessary fluctuations, and monitor future freight or bunker surcharges that could affect pricing even when field supply remains adequate.

Blackberries

Blackberry supplies remain very limited as the industry works through a seasonal production transition. Mexican production has declined substantially due to seasonal pruning and the completion of older fields. Recent heat and rainfall in Mexico have also affected berry size, firmness, and overall packout, resulting in quality ranging from fair to good. Domestic production has begun in Cen-

A Fresh Take on Value-Added Distribution tral California and Watsonville, but cooler weather has slowed crop development and prevented volume from building quickly enough to satisfy demand.

Watsonville fruit is showing excellent firmness, flavor, and appearance, but current harvest volume remains insufficient to balance the market. North Carolina production is also light, and meaningful Oregon and Washington volume is not expected until later in July. As a result, demand continues to exceed available supply, keeping FOB pricing elevated and open-market availability inconsistent. Gradual improvement is expected as California harvests expand and Pacific Northwest regions begin production, but significant relief may not occur until late July. Buyers should secure supply in advance, avoid aggressive promotions, expect occasional prorating, and maintain strict receiving inspections on Mexican fruit.

Blueberries

Blueberry availability is improving as production shifts away from declining Mexican and East Coast programs into California, Michigan, Oregon, Washington, and British Columbia. New Jersey volume remains limited, while Michigan has begun harvesting. The Pacific Northwest is becoming the dominant supply region, with Oregon entering stronger production and British Columbia beginning to pack. This regional expansion should result in increasing weekly supply and downward pressure on market pricing.

Quality from California and the Pacific Northwest has generally been excellent, with good appearance, flavor, and larger berry sizing. Michigan production has experienced some yield and quality variability due to unfavorable weather, while forecasted rain in Washington and British Columbia could create brief harvest interruptions. Nevertheless, the overall market is expected to become more favorable as Northwest volume reaches peak production. Buyers may gradually expand promotional activity, but they should continue monitoring weather and shelf life by growing region. Pricing is expected to ease as supply builds, although short-term fluctuations remain possible if rain interrupts harvests.

Raspberries

Raspberry market information varies somewhat among the reports, reflecting rapidly changing regional conditions. Mexico continues to provide fruit, and some suppliers report favorable volume and excellent quality, while other sources indicate that late-season Central Mexican production is declining. California harvests are gradually increasing, but cooler temperatures have slowed crop development in some districts. Baja production is expected to become more meaningful later in July.

Overall quality from stronger Mexican and Watsonville programs is reported as excellent, with good color, firmness, and flavor. However, open-market availability remains inconsistent because supply is concentrated among fewer growing regions during the transition. The market may remain firm in the immediate term, particularly for uncommitted volume, before easing as California and Baja production increases. Buyers should remain closely aligned with their specific suppliers because program availability may be better than the broader spot market suggests. Advance commitments are recommended, and promotions should be based on confirmed regional volume rather than general market expectations.

Strawberries

Strawberry supplies remain generally steady, with Watsonville and Salinas carrying most fresh-market production. Cooler coastal temperatures have supported firmness, shelf life, and overall fruit condition, but they have also slowed ripening and prevented harvest volumes from expanding significantly. Santa Maria has started harvesting limited new-crop fruit, with production expected to build gradually over the next several weeks.

Quality is generally good, although isolated reports of bruising, softer skin, and smaller fruit continue. Demand strengthened around the Independence Day holiday, but no major weather disruptions are currently anticipated. A warmer weather pattern should accelerate ripening and improve open-market availability, which may cause pricing to ease modestly. However, excessive warming could eventually shorten shelf life, so receiving and rotation practices remain important. Buyers can maintain normal promotional activity where quality is confirmed, but they should avoid excessive inventory and monitor daily pack counts and temperature conditions.

Grapefruit

Grapefruit supplies are currently stable, with adequate volume available for normal demand. The category is performing more consistently than lemons and oranges, although sizing remains an important consideration across the broader citrus complex. Domestic inventories should provide reasonable near-term coverage, but imports may become increasingly important as the summer progresses, particularly for East Coast customers and programs requiring specific size profiles.

Quality is generally acceptable to good, and no immediate major shortage is indicated. However, buyers should begin evaluating imported grapefruit options before domestic sizing becomes more restrictive. Freight, import timing, and country-of-origin requirements may affect delivered costs. The market is expected to remain steady in the near term, but prices could strengthen if domestic supplies decline before imported volume is fully established. Maintaining communication with citrus suppliers and providing adequate lead time will reduce the risk of size substitutions or temporary gaps.

Lemons

ALERT

The lemon market remains elevated due to limited domestic supplies, strong demand, and a size profile heavily weighted toward larger fruit. District Two, including Ventura and Oxnard, is supplying most current California volume. Internal quality and juice content remain good, but 140-, 165-, 200-count and other smaller sizes are increasingly difficult to secure. Some suppliers are limiting new commitments on smaller fruit or applying size averages to protect established programs.

Southern Hemisphere imports are supplementing domestic supply and should provide gradual relief during July. Nevertheless, timing, freight, grade differences, and import availability may prevent immediate market normalization. Pricing is expected to remain firm in the near term, especially for small sizes and preferred grades. Buyers should provide additional lead time, consider imported fruit, allow size substitutions where operationally possible, and avoid depending exclusively on small domestic lemons. Larger sizes offer the best current availability and may represent the most economical purchasing option.

Limes

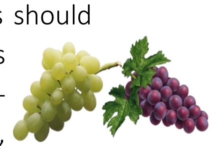
Lime supplies are improving as additional Mexican volume crosses the border, but the size distribution remains heavily concentrated on smaller fruit, particularly 230- and 250-count limes. Larger sizes, including 175 count and larger, remain limited and continue commanding premium prices. Colombian and other Central American imports are supplementing Mexican production and helping stabilize total availability.

Heavy rainfall in Mexico may support future crop development but can temporarily slow harvesting, reduce border movement, and contribute to cosmetic defects such as oleocellosis. Quality is generally acceptable, although appearance and shelf-life variation remain possible. The overall market should continue easing as Mexican production expands, but large-size limes are expected to remain firm for several weeks. Buyers should allow substitutions to smaller counts, inspect fruit carefully at receiving, and plan promotions around the size profile currently available rather than traditional specifications.

Oranges

California Valencia oranges are now the primary domestic orange source and are showing excellent sugar levels and overall eating quality. The crop is heavily weighted toward larger fruit, especially 56- and 72-count sizes. Smaller counts, including 88s, 113s, and smaller, remain limited and may require substitutions to maintain program coverage.

Total Valencia supply is improving, but some shippers are experiencing seasonal limitations and may use imports to cover contractual commitments. The market for large fruit should remain comparatively stable, while small-size oranges are likely to remain firm throughout the summer. This creates particular challenges for schools, vending, institutional feeding, and bag programs that depend on smaller counts. Buyers should communicate size requirements well in advance, consider imported fruit when appropriate, and build flexibility into specifications. Large-size promotional opportunities may be available where customer applications allow.



Grapes

The table-grape industry is transitioning rapidly from Mexico into California. Residual Mexican fruit remains in the supply chain but is declining quickly. California red grape production has begun strongly and approximately two to three weeks earlier than normal. Green grapes remain more limited but should increase over the next 7–10 days, while black grape production is also expected to expand.

Quality is expected to improve significantly as fresher California fruit replaces late-season Mexican inventory. Current California crops show favorable appearance and condition, and overall supplies should become more dependable as additional vineyards begin harvest. The early start is positive for immediate availability but could create a supply concern later in the season if acreage finishes earlier than usual. Near-term pricing should ease as California volume builds, particularly on red varieties.

Buyers should closely monitor green-grape availability, avoid carrying excessive late Mexican inventory, and remain attentive to the possible effect of the early season on late-summer and fall coverage.

Cantaloupe

Cantaloupe remains one of the most challenging produce categories. Offshore production has ended, and California Desert acreage was severely affected by whitefly and virus pressure, causing fields to finish earlier than expected. This created a significant supply gap before San Joaquin Valley production was fully prepared to carry the market.

Central California harvests have started, and quality is reported as good, but initial volume remains limited. Supplies are expected to improve gradually over the next two to three weeks as more fields enter production. Until then, markets will remain elevated, contracts may receive priority, and open-market orders may be subject to prorating or size substitutions. Specialty melons such as Lemon Drops and Canary melons may offer limited alternatives, but their availability is also restricted. Buyers should order well in advance, maintain size flexibility, avoid aggressive promotions, and anticipate continued high pricing until San Joaquin Valley volume reaches full production.

Honeydew

ALERT

Honeydew supplies remain extremely tight. Offshore and Mexican programs have largely finished, making domestic production the primary source. California Desert fields were affected by the same whitefly pressure that disrupted cantaloupes, resulting in an early shutdown and a temporary gap before Central California production developed sufficient volume.

Contract customers are being prioritized, but prorating and size substitutions remain possible. California production is beginning, although meaningful market relief will depend on how quickly harvest volumes increase. Quality on available domestic fruit is generally good, but open-market supply is limited and pricing remains high. Buyers should treat honeydews as a restricted commodity, place orders early, remain flexible on count size, and avoid promotional commitments until stronger San Joaquin Valley production is confirmed.

Mango

The uploaded reports provide less detailed coverage for mangoes than for the other fruit categories. Current summer supply is generally expected to depend primarily on Mexican production, with availability influenced by regional rainfall, harvest timing, border movement, and variety transitions. Seasonal Mexican rain can support fruit development but may also interrupt harvest activity or create temporary quality variability.

Because the reports do not provide a specific mango volume or pricing alert, the market appears less distressed than melons, berries, or lemons. Buyers should nevertheless monitor maturity, internal condition, sizing, and country-of-origin transitions closely. Procurement should emphasize confirmed ripeness specifications and arrival quality rather than relying only on FOB price. This category should be updated further when supplier-specific mango information becomes available.

Pineapple

ALERT

Pineapple availability has improved as Costa Rican production increased. Suppliers expect the current improvement to continue for several weeks, supporting better program coverage and generally favorable quality and flavor. However, Mexico’s post-peak volume is declining, and some reports continue to characterize the broader market as relatively tight despite Costa Rican stability.

Larger sizes are expected to improve later in July, while crownless, organic, and other specialty pineapple packs remain limited. The market should remain manageable for conventional product, but buyers should not assume equal availability across all pack styles and sizes. Near-term pricing is expected to remain steady to moderately firm. Normal promotions may be supported when secured through established programs, but buyers should provide additional lead time for organic, crownless, or specific-size requirements.

Stone Fruit

California stone-fruit production is nearing full seasonal volume. Peaches and nectarines continue to size upward, making smaller fruit increasingly limited. Pluots have begun, with additional varieties expected to enter the market as July progresses. Quality is generally good, supported by warm interior California weather that is advancing maturity and sugar development.

Washington cherry production remains active but is expected to begin tapering in the coming weeks. Demand for stone fruit may strengthen when melon availability is constrained, as retailers shift promotional attention toward peaches, nectarines, plums, pluots, and cherries.

Market pricing should remain relatively stable where volume is strong, although specific varieties, premium grades, and smaller sizes may command firmer prices. Buyers can promote California peaches, nectarines, and plums, but they should manage maturity carefully and avoid over-ordering fruit during periods of extreme heat.

Watermelon

Watermelon supplies tightened as Mexican crossings declined and domestic production was delayed by rain in Georgia and Florida. Strong Independence Day demand added further pressure to an already limited market, pushing prices higher. South Carolina continues harvesting and should remain active through approximately late July, weather permitting.

Quality is generally average to good, with no broad systemic defects currently reported. Domestic supply should improve as additional regional programs become established, and production is expected to transition toward Indiana

Vegetables

Asparagus

ALERT

Asparagus supplies remain tight as Michigan, Washington, and Canadian seasonal programs wind down, increasing the industry's dependence on Mexico and Peru. Production from both primary import regions remains below normal. Hot weather in Mexico is affecting field output and limiting jumbo sizing, while Peruvian shipments continue to face intermittent logistical challenges and competition from export markets. These factors are sustaining elevated FOB levels and creating uneven availability across sizes and pack styles.

Quality is generally acceptable but variable, with occasional concerns tied to heat stress, open tips, feathering, and inconsistent sizing during the regional transition. White asparagus remains especially constrained. Market conditions are expected to remain firm through much of the summer because no major production region is positioned to create immediate oversupply. Buyers should place orders early, use open size specifications where possible, and avoid committing to aggressive promotions until Mexican or Peruvian volume improves materially.

Avocados

The avocado market remains well supplied through a diversified production base consisting of Mexico, California, and Peru. Recent reported movement included approximately 34.2 million pounds from Mexico, 17.8 million pounds from California, and 13.5 million pounds from Peru. These combined volumes are maintaining comfortable inventories and supporting stable pricing despite healthy retail and foodservice demand.

Mexico is transitioning from the mature main crop into the Flor Loca crop. The older crop continues to carry high dry matter and strong eating quality, but it is ripening rapidly. Flor Loca dry matter is lower and should move into the mid-to-upper 20% range as the crop develops. The changing Mexican crop is also expected to shift the size distribution toward smaller fruit. California still has meaningful seasonal volume, while increasing Peruvian imports should help limit upward price pressure. Buyers should manage ripening protocols carefully during the crop transition and monitor the growing availability of smaller counts. Overall buying conditions should remain favorable through much of July.

Bell Peppers

Green bell pepper supplies remain tighter than normal. Eastern production is transitioning away from Georgia and South Carolina, where remaining volume is light, while North Carolina continues recovering from earlier heat impacts. New Jersey and Michigan should improve the Eastern supply position as their programs gain momentum. In the West, production is transitioning from Bakersfield and Arvin toward Fresno and other Central California districts, creating temporary gaps and firmer pricing.

Quality on available green bells is generally good, but the limited volume has placed the category on alert and increased the likelihood of regional price volatility. Colored bell peppers are in a better position, with good open-field supply from Bakersfield, Baja, and the Southeast. Canadian and Mexican greenhouse peppers also remain relatively steady with good overall quality. Buyers should secure green bells in advance, remain flexible on size and growing region, and consider colored peppers as alternatives where customer specifications permit.

Broccoli

Broccoli supplies are lighter than they were in recent weeks. Salinas and Santa Maria production is tracking below forecast, while demand has increased enough to push market prices higher. Quality is generally fair to good, although buyers may encounter variability in crown size, bead development, color, and branch structure depending on the field and harvest date.

The market is expected to remain firm over the next several weeks because current California production has not fully met projected output. Asian-cut crowns are particularly pressured and have reached escalated status in some programs. Broccolini is performing more favorably, with steady supply, good demand, and improved availability supporting more stable pricing. Buyers should provide additional lead time on conventional crowns, verify pack specifications, and consider broccolini or alternative pack styles when appropriate.

Brussels Sprouts

Brussels sprout supplies remain generally adequate, although reports differ slightly by supplier. Some sources describe strong supply and favorable promotional conditions, while others indicate slightly limited availability with the potential for a modest price increase. This variation suggests that programmed supply is performing better than the broader open market.

Quality remains good overall, with acceptable color, firmness, and sizing. Current market pricing is mostly steady, but reduced output from selected growers could strengthen prices modestly in the near term. Buyers should remain aligned with established suppliers and confirm volume before scheduling promotions. Normal purchasing remains appropriate, but large uncommitted orders may face less favorable pricing if supplies tighten further.

Cabbage

Cabbage supplies, yields, and quality remain strong from Central California.

Current production is sufficient to meet increased demand without creating material market pressure. Contract and open-market pricing remain stable, and consistent availability is expected in the near term.

Green cabbage is included on some industry watch lists, largely because seasonal transitions and regional weather can quickly alter availability. However, the current supply position remains favorable. Buyers should continue normal ordering patterns and may consider promotional activity where local demand supports it. Receiving inspections should continue to focus on trim, discoloration, insect pressure, and core condition, but no widespread quality issue is presently reported.

Carrots

Carrot availability continues improving as favorable growing conditions support stronger production across California’s primary regions. Bakersfield is currently the principal source and is reporting good availability across conventional varieties and sizes. The market is returning toward a more normal supply balance after earlier limitations.

Quality is good, and pricing remains generally steady. Whole carrots, cello packs, and processed specifications should remain adequately supplied, although individual shippers may experience temporary size or pack-style limitations. Buyers can maintain normal inventory levels and consider moderate promotional activity. The principal near-term risks are excessive Central Valley heat, which can affect field operations, and freight cost from California to Eastern markets.

Cauliflower

Cauliflower supplies remain tight and are expected to become firmer. Production from Salinas and Santa Maria is below forecast, while demand has increased compared with the prior week. Quality is reported as fair to good, but inconsistent sizing, discoloration, jacket condition, and variable packouts may occur as growers work through lower-yielding fields.

The reduced supply position is supporting higher pricing, and additional strengthening is possible in the immediate term. The market is especially vulnerable because cauliflower output can change rapidly in response to coastal temperature patterns and field maturity. Buyers should order early, avoid speculative inventory, and maintain flexibility on count size. Promotions should be limited until harvest volume recovers and quality becomes more consistent.

Celery

Celery supply is improving as production transitions more fully into Salinas. Additional volume from Santa Maria, Oxnard, and Salinas is keeping the market adequately supplied across sizes. Some reports characterize availability as plentiful and encourage aggressive promotion, while organic celery remains considerably more limited.

Conventional quality is good, with stronger weights and satisfactory color and texture. Increasing availability is placing downward pressure on market pricing, creating favorable purchasing conditions for retail and foodservice users. Buyers can consider promotional opportunities on conventional celery while maintaining closer oversight of organic requirements. Receiving teams should continue checking for pith, insect pressure, discoloration, and mechanical damage, but no broad conventional quality problem is indicated.

Cucumber

Cucumber supplies remain moderate as Eastern production moves north from Georgia and North Carolina into New Jersey, Michigan, and New York. This seasonal movement is temporarily limiting continuity, but availability should improve as northern programs establish stronger harvest volume. Late-season Eastern fields may show some quality variability.

Western supply continues from Baja and Central Mexico. Weather has affected selected Baja crops, but overall quality remains acceptable to good. Increasing northern domestic production should gradually balance the market over the next several weeks. Buyers should maintain normal ordering with additional attention to growing region, shelf life, and grade. Price movement should remain relatively steady unless rain interrupts Eastern harvests or Mexican crossings.

Eggplant

Eggplant availability is generally favorable, although production regions are changing. Georgia’s season is ending, and Eastern supply is shifting toward North Carolina and other regional programs. In the West, Coachella has finished and production has transitioned into Fresno and California’s Central Valley, with Central Mexico continuing to provide supplemental volume.

Some reports describe ample supply and easing markets, while more recent information notes fair quality during the transition. This suggests that overall volume is adequate but condition may vary by source. Buyers should inspect for scarring, sunburn, softness, seed development, and irregular shape. Pricing should remain manageable as additional seasonal production expands, but better-quality fruit may carry a premium during the transition.

Garlic

Peeled garlic supply transitioned to Mexican product in late June and is expected to remain dependent on Mexico through late July or early August, when new-crop California garlic becomes available. This transition is a normal seasonal strategy designed to bridge the period between older domestic inventories and the new California harvest.

Current quality is generally good, and supply is expected to remain adequate. Buyers should nevertheless monitor origin, shelf life, clove condition, and moisture because quality characteristics can differ between Mexican and California product. Pricing should remain relatively steady unless border movement or weather disrupts Mexican shipments. New California crop should improve domestic availability later in the summer, though early-season costs may reflect harvesting and curing expenses.

Green Onions

Green onion supplies remain steady, with Mexico serving as the primary source. Availability and pricing are expected to remain favorable through the coming weeks, provided seasonal rainfall does not materially delay harvest or crossing activity.

Quality is generally good, and current market conditions support normal purchasing. Buyers should continue monitoring for decay, yellowing, excessive moisture, and weak tops during periods of rain. No major supply disruption is currently anticipated, although Central Mexican thunderstorms could create brief harvest delays.

Green Beans

Green bean conditions vary significantly by coast. Eastern supplies are steady, with good quality and balanced demand supporting stable to slightly lower prices. Western supplies remain tighter because of transition gaps and acreage changes, creating higher and more volatile pricing. Foodservice-preferred grades and specific sizing may be particularly inconsistent.

The broader industry continues to classify green beans as escalated because national availability is not uniform. Gradual relief is expected as additional desert and regional domestic production develops. Buyers serving Eastern markets may find comparatively favorable conditions, while Western buyers should expect greater pricing pressure and possible specification flexibility. Advance planning is advisable for large foodservice or retail programs.

Kale

Kale supplies remain steady from Oxnard and Central California, with good overall availability expected to continue. Demand is balanced, pricing is stable, and quality ranges from fair to good depending on the supplier and field.

No significant shortage is anticipated in the near term. Buyers can maintain regular purchasing patterns, but receiving teams should continue monitoring for yellowing, mildew, insect pressure, and dehydration during warmer weather. Market conditions are likely to remain stable into the following week unless coastal weather materially changes harvest volume.

Lettuce – Iceberg

Iceberg lettuce conditions are improving but remain somewhat inconsistent across reports and suppliers. Supplies have increased, demand has eased, and market pricing has declined from recent highs. Carton weights are improving, and some shippers report excellent sizing and sufficient volume to support promotions. However, other growers continue operating under averages because harvestable acreage remains affected by Impatiens Necrotic Spot Virus and field disease pressure.

Quality is generally fair to good. Buyers may still encounter lighter heads, short shelf life, insect pressure, mildew, or variable internal condition. Value-added iceberg products may show more pronounced shelf-life concerns than whole-head product. The market should continue easing if forecasted production develops as expected, but disease pressure remains a significant risk throughout the summer. Buyers should avoid over-inventory, maintain strict receiving standards, and use supplier-specific information when planning promotions.

Lettuce – Leaf

Green leaf, red leaf, and romaine supplies have improved considerably. Reduced school demand and favorable coastal weather have created better availability, and pricing has declined from recent elevated levels. Green and red leaf quality is generally good, while romaine and romaine hearts continue improving but remain more exposed to field disease and condition issues.

Romaine may show bruising, fringe burn, light weights, mildew, increased core, or other outer-leaf defects. Romaine hearts remain tighter than conventional romaine, although both markets are trending downward. Green and red leaf are currently more stable and may support normal promotional activity. Buyers should distinguish between whole-leaf and processed specifications because value-added items may experience different yield and shelf-life conditions.

Lettuce – Tender Leaf

Tender-leaf items—including spinach, arugula, and spring mix—remain well supplied for normal demand. Central California production is strong, pricing is stable, and quality is expected to improve as shipments continue moving through established coastal programs.

The principal operational concern is shelf life during summer transportation and distribution rather than field availability. Tender products require strong cold-chain management because even brief temperature abuse can accelerate yellowing, breakdown, and moisture-related defects. Buyers can maintain normal purchasing and promotional schedules but should avoid excessive inventory and ensure rapid product rotation.

Onions

The onion market is strengthening as Texas and Georgia programs finish and summer production shifts to New Mexico and Central California. New Mexico yields have been reduced by seeder issues, while California suppliers are also facing transition-related volume limitations. Having constrained supply in both primary regions has tightened availability across colors and sizes and caused pricing to rise quickly.

Quality remains strong overall, but the market is expected to stay firm until production increases over the next several weeks. Freight is an important component of delivered pricing, particularly as supply becomes concentrated in Western regions. Buyers should provide additional lead time, remain flexible on origin and size, and monitor red, yellow, and white onion availability separately. Large or highly specific orders may require split sourcing until regional production stabilizes.

Chili Peppers

Chili pepper supplies are in a fragmented seasonal transition. In the East, Georgia is winding down, and remaining production is spread among smaller growers in North Carolina and other local districts. Michigan, New York, and New Jersey should provide relief as new acreage begins harvesting. Current Eastern supply is weighted toward jalapeños, and complete mixed-chili programs may be difficult to assemble from a single region.

Western production is centered in Baja, California, and Central Mexico. Most varieties are available from Central Mexico, but recent rains have reduced consistency and created fair-to-good quality. Baja volume remains light. Habaneros, Fresnos, Shishitos, and Anaheims are among the tightest items; red jalapeños may be used as an alternative to Fresnos when acceptable. Buyers should plan by individual variety rather than treating chili peppers as one uniform category and should maintain careful receiving inspections until regional programs become fully established.

Potatoes

ALERT

The russet potato market is strengthening as the 2025 storage crop approaches its final phase. Idaho continues shipping Burbanks, but the size profile has shifted toward smaller counts, particularly 70 through 120 count. Larger 40 through 60 count potatoes are tightening because of reduced packouts and declining storage inventories. Shippers are carefully managing remaining supplies to bridge the period before new-crop Norkotahs become available.

Washington quality remains strong, while yellow potatoes, sweet potatoes, and fingerlings are more limited. Fingerlings are experiencing a temporary supply gap estimated at four to six weeks. The 2026 Idaho crop was planted early, but acreage was reduced to approximately 298,915 acres following the prior season's oversupply. Favorable weather and irrigation currently support good production potential, though the smaller acreage could reduce the margin for error. Buyers should provide additional lead time, allow size substitutions, and monitor storage-crop quality closely.

Squash – Yellow & Zucchini

Yellow squash supplies are steady across several Eastern growing regions as the market settles into summer production. New Jersey conditions are improving, and other Eastern programs are providing adequate coverage. Western production continues from California, Oregon, Washington, Baja, and Central Mexico.

Quality is more variable than zucchini, particularly from selected California fields where scarring, softness, and weather-related defects have been reported. Northern production regions are generally providing better condition. Pricing should remain relatively stable, but high-quality yellow squash may command a premium. Buyers should source carefully by region and avoid building excessive inventories because yellow squash can deteriorate rapidly during warm-weather distribution.

Zucchini supply remains steady across multiple domestic and Mexican growing regions. Eastern summer production is becoming more established, while California, Oregon, Washington, Baja, and Central Mexico continue supplementing national availability. The broad regional base is helping maintain balanced market conditions.

Quality is generally good and more consistent than current yellow squash quality. Pricing is expected to remain stable unless heat or heavy rain disrupts harvests in a major region. Buyers can maintain normal order volumes and consider moderate promotional activity, but they should continue checking for scarring, dehydration, crooked shape, and soft ends at receiving.

The next section is the extensive tomato market report divided into Domestic and Mexico, including round, Roma, grape, cherry, organic, regional production, quality, sizing, demand, pricing direction, and the two-to-four-week outlook.

Freight Update

National Reefer Freight Outlook

Fuel Following the Independence Day holiday, transportation conditions have improved significantly compared with late June. Reefer capacity has expanded across major growing regions as shipping schedules normalized following holiday disruptions. Most carriers report increased truck availability throughout California, Arizona, Texas, Florida, and the Pacific Northwest.

Although capacity has improved, freight remains considerably more expensive than historical averages due to continued inflationary pressures affecting labor, maintenance, insurance, equipment, and diesel fuel expenses. National transportation markets remain considerably healthier than those experienced during spring produce season but continue requiring proactive scheduling for long-haul shipments.

Industry participants report improved truck availability throughout California growing regions while Southeastern markets continue tightening periodically due to increased summer produce movement. Cross-border freight from Mexico remains relatively stable despite periodic weather delays associated with seasonal rainfall.

Diesel and Fuel Costs

Diesel fuel remains substantially above year-ago levels, continuing to influence transportation expenses throughout the produce supply chain.

Higher diesel costs continue impacting:

- Farm operations
- Irrigation
- Harvest labor
- Refrigerated transportation
- Ocean freight
- Cross-border logistics
- Packaging distribution

Although freight capacity has improved, transportation expenses remain a significant contributor to overall produce costs.

Freight Outlook (Next 2–3 Weeks)

Forecast Period: Mid-July through Early August 2026

The North American refrigerated transportation market is expected to remain relatively balanced over the next two to three weeks, with modest seasonal tightening occurring in selected growing regions as California, the Pacific Northwest, the Midwest, and Eastern production continue increasing. Truck availability has improved noticeably following the Independence Day holiday, reducing the widespread capacity constraints experienced during late June. While the market has become more manageable, freight rates are expected to remain above historical averages due to elevated diesel prices, higher operating costs, and continued demand for refrigerated equipment.

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