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Crop Update

May 27, 2026

May Grey to June Gloom

As we close out May and move into June, several high-volume items are still working through supply gaps. Some markets are getting help from lighter school demand, but weather, disease pressure, and seasonal transitions continue to limit availability on key commodities. The biggest areas to watch this week are lettuce, lemons, potatoes, and avocados.

Row crops are mixed. Broccoli and cauliflower have improved after a difficult stretch, but lettuce has turned active again. Iceberg supplies are tightening as disease pressure increases in the Salinas Valley, with INSV, Sclerotinia, mildew, and internal burn reducing yields in current fields. Romaine remains extremely tight, and green leaf is still limited. Quality is generally good, but harvestable acreage is the issue. Mexico is moving into its lighter summer production window, while regional programs across the United States and Canada should begin adding volume through June. Until that volume builds, lettuce markets are expected to remain elevated.

Lemons remain one of the tighter citrus items. District One is past peak production and winding down, while District Two is now carrying most of the domestic crop. With fewer growers in the district and strong demand still in place, all sizes are tight, not just the smaller fruit. The market is expected to stay elevated through June. Offshore fruit should begin arriving late June into early July, but early arrivals will likely lean larger and may carry higher pricing before broader relief develops.

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Idaho russet potatoes are in a seasonal variety transition. Norkotahs are winding down, and Burbanks are becoming the main storage variety until new crop begins. Burbanks typically have a smaller overall size profile, often peaking closer to 90ct, and their shape can contribute to increased #2 availability compared to Norkotahs. New crop potatoes are in the ground now and are expected to become available in early August. Until then, the variety shift will affect both demand and pricing as customers adjust from Norkotahs into Burbanks.

Avocados remain the most volatile category heading into June. Mexico’s main crop is in its final stretch, and fewer growers are actively harvesting. Some are slowing harvests to wait for stronger late-season pricing, which is creating a tighter supply environment and pushing field costs higher. California is helping support the market, but current production is not enough to offset the decline from Mexico. Relief is expected in July as Flora Loca and Peru begin adding volume, but the next several weeks will remain tight and cost-sensitive.

Lead time and flexibility on origin will be the biggest help in fulfilling orders as supply remains limited across these key categories. June will require close attention and flexibility on size, variety, and country of origin.

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