

Crop Update

June 24, 2026

Lettuce Ease, Melon Squeeze

Lettuce markets are finally starting to loosen up after several weeks of elevated pricing and limited availability. Green leaf has already worked its way back toward normal, while romaine, romaine hearts, and iceberg should continue easing over the next two weeks as California production improves. Quality is improving, but we are still seeing some lighter weights, mildew, fringe burn, and internal burn. Better yields are bringing more product to market and creating some much needed relief.

Melons are a different story. The Arizona and California desert seasons finished earlier than expected after whitefly and virus pressure reduced yields and caused late fields to fall apart. Cantaloupe and honeydew supplies are extremely limited during the transition to Central California, and there is very little open market fruit available. New crop cantaloupe has started in a limited way, with better volume expected over the next couple of weeks. Honeydew will follow shortly behind. We should start to see broader relief once Westside production builds, likely around the week of July 5. Until then, lead time and flexibility on size will be important.

Avocado supplies are improving as Mexico's Flor Loca crop begins to arrive. Early fruit may show some lenticel marking from the rainy growing conditions, but that is cosmetic and does not affect the internal quality. We may also see some uneven ripening early in the crop while dry matter continues to build. Flor Loca fruit can stay bright green even when it is ripe, so firmness is still the best way to judge readiness. These early-season traits should improve as the crop matures and volume increases, but good rotation will be important during the transition.



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Strawberry production remains strong in Salinas and Watsonville. Cooler weather should help the fruit firm back up after the recent stretch of heat and heavy volume. The market is steady with some softer undertones as supply is running ahead of demand. Santa Maria continues its seasonal decline, but new late-summer acreage should begin adding fruit over the next few weeks.

Blueberries remain tight as Central Mexico finishes and eastern production struggles with light yields and quality issues. The Pacific Northwest is starting slowly and should build week over week, with Michigan expected to join the mix soon. Raspberries are firming as Mexican production declines faster than California can ramp up, while blackberries remain relatively steady.

Overall, lettuce is finally giving us some relief, but melons will remain the biggest challenge until Central California volume improves. Avocados and strawberries are moving in the right direction, while blueberries and raspberries still need a little more attention. Lead time, size flexibility, and good inventory rotation will be the biggest help through these transitions.

