



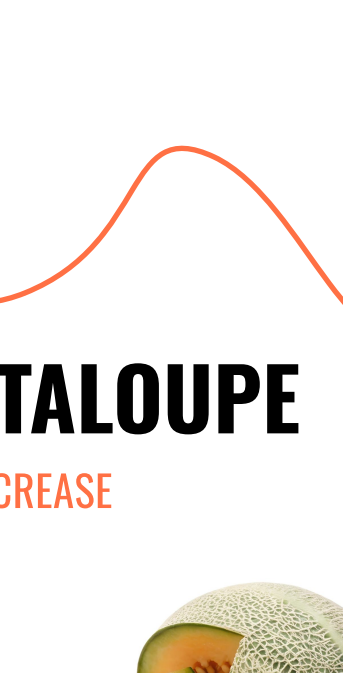
June MARKET UPDATES

The heat is on as we head into the peak summer and holiday period. In the U.S., in particular, production conditions are rapidly shifting, with some sought-after produce becoming highly volatile while other items are stabilizing. Weather, regional transitions, and strong seasonal demand are all affecting supply and costs.

This update highlights which items are tightening or improving, why those changes are occurring, and what chefs and buyers should watch so menu decisions, specifications, and purchasing strategies help keep food costs in check.

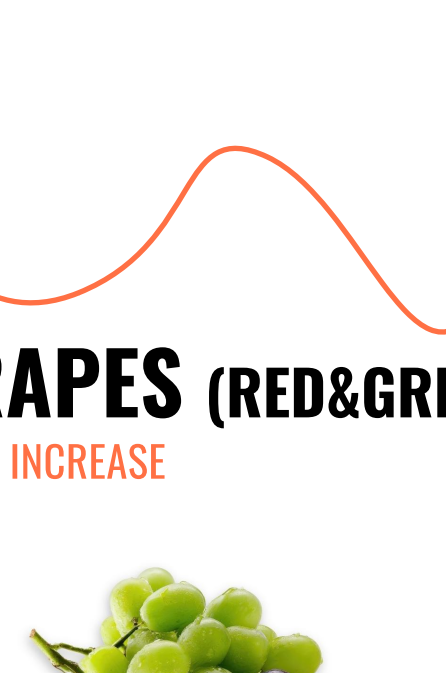
APPLES

PRICE INCREASE



AVOCADOS

PRICE INCREASE



BANANAS

PRICE INCREASE



BLUEBERRIES

PRICE INCREASE



CANTALOUPE

PRICE INCREASE



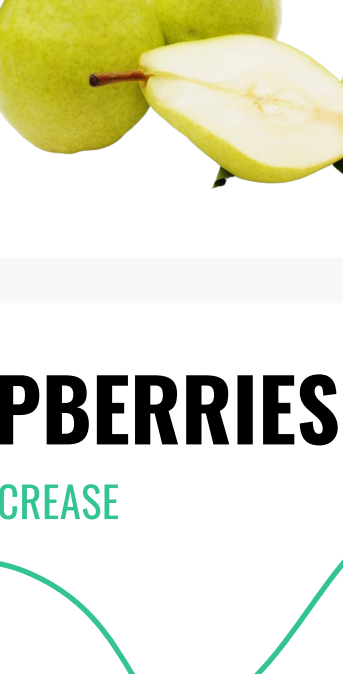
GRAPES (RED&GREEN)

PRICE INCREASE



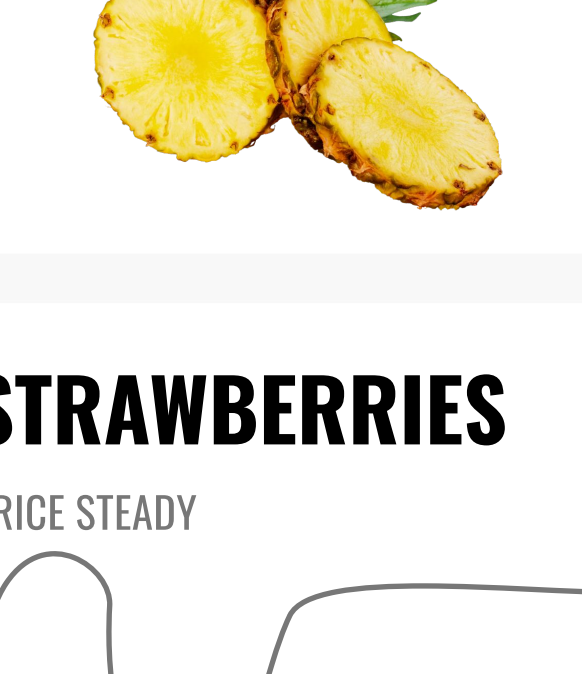
HONEYDEW

PRICE INCREASE



LEMONS

PRICE INCREASE



LIMES

PRICE INCREASE



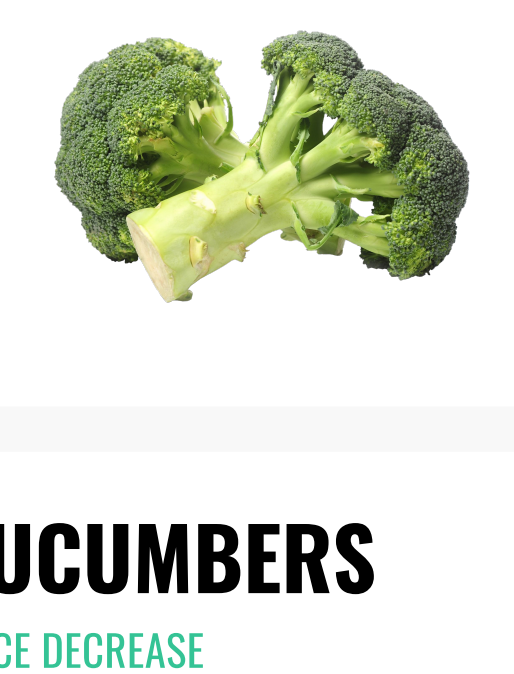
ORANGES

PRICE INCREASE



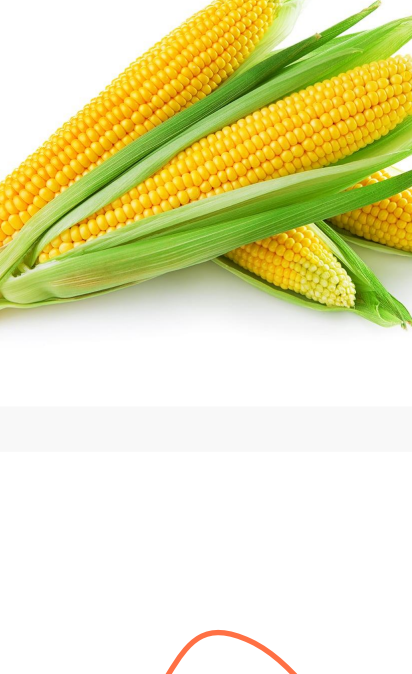
PEARS

PRICE STEADY



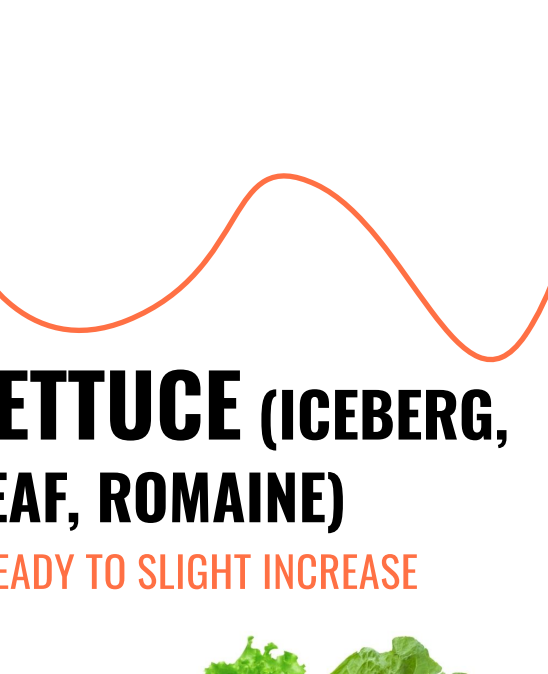
PINEAPPLES

PRICE DECREASE



RASPBERRIES

PRICE DECREASE



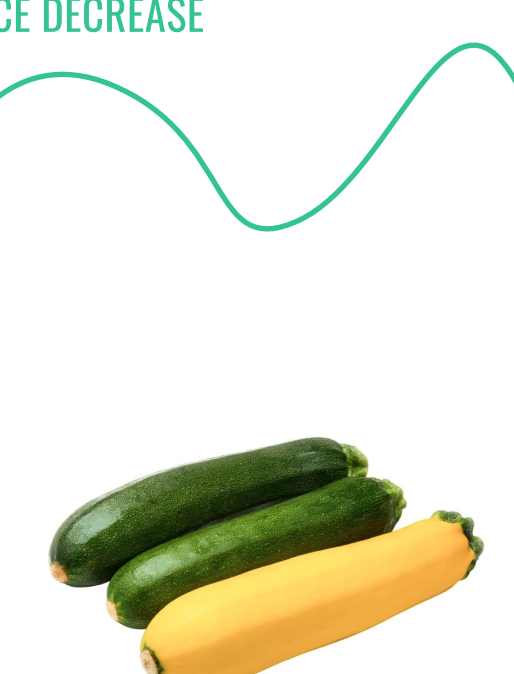
STRAWBERRIES

PRICE STEADY



STONE FRUITS

PRICE STEADY



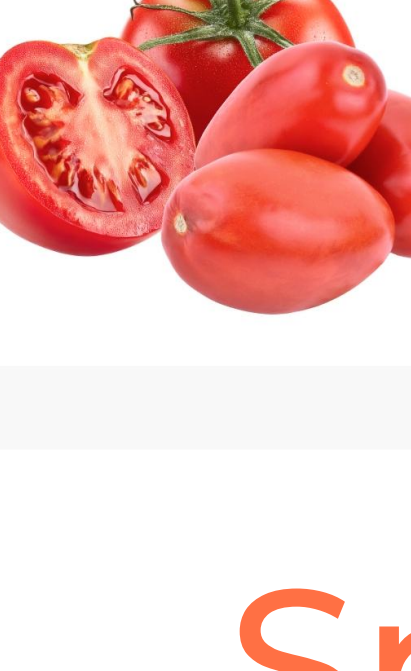
WATERMELONS

PRICE INCREASE



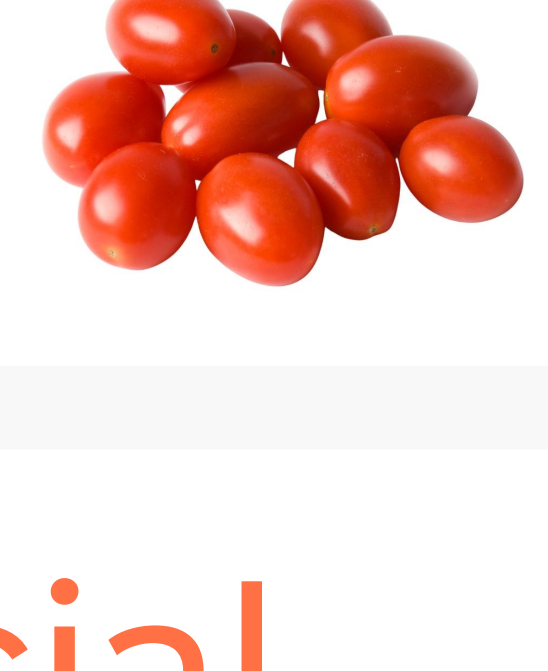
BROCCOLI

PRICE STEADY



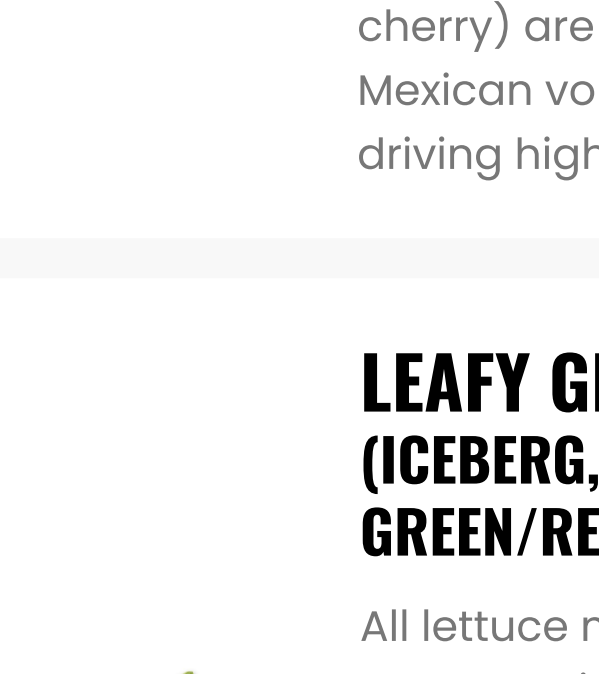
SWEET CORN

PRICE STEADY



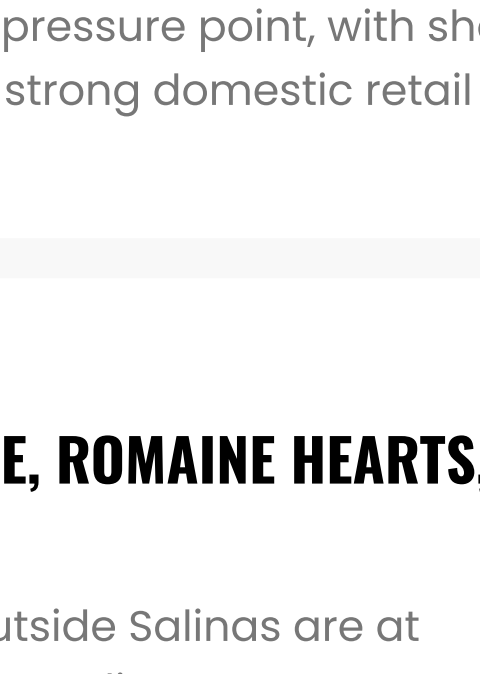
CUCUMBERS

PRICE DECREASE



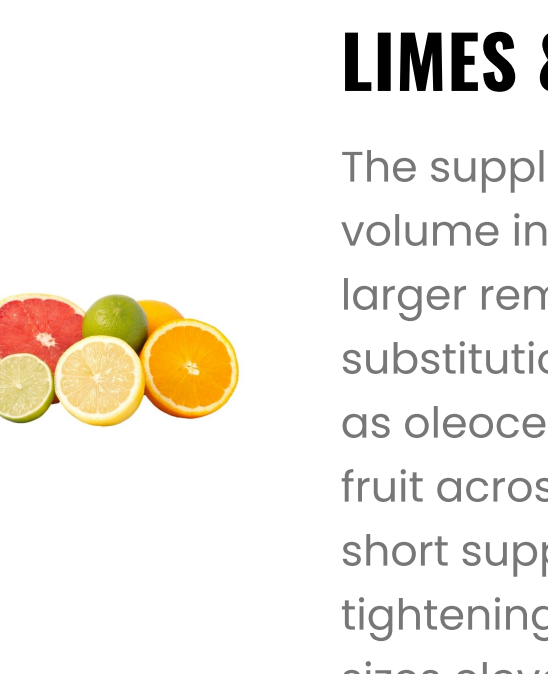
FRENCH/GREEN BEANS

PRICE INCREASE



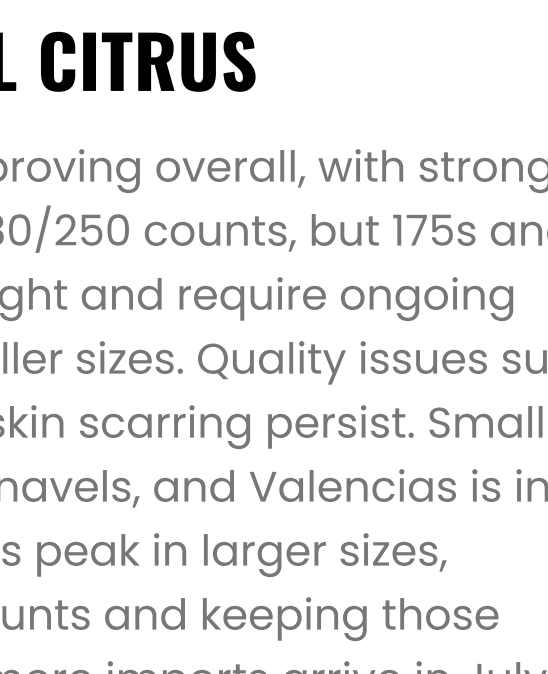
LETTUCE (ICEBERG, LEAF, ROMAINE)

STEADY TO SLIGHT INCREASE



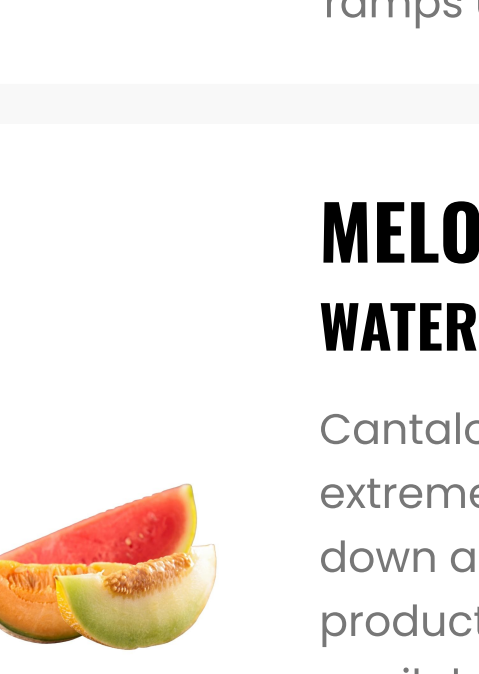
POTATOES (RUSSET/ RED/YELLOW)

PRICE INCREASE



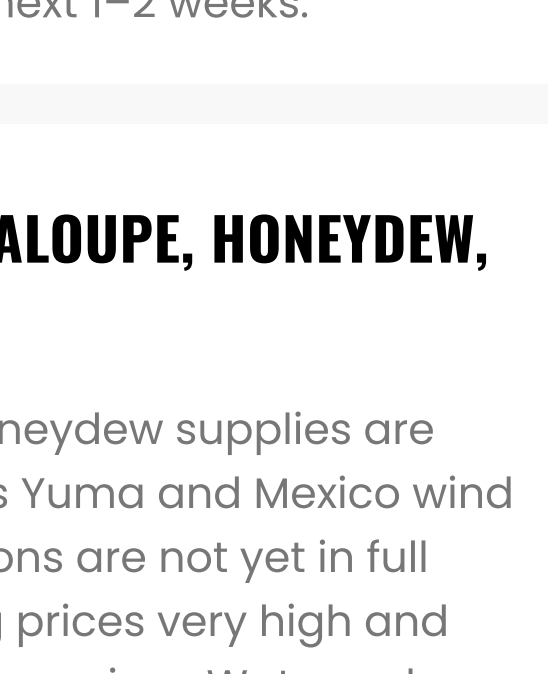
SQUASH (YELLOW & ZUCCHINI)

PRICE DECREASE



SWEET POTATOES

PRICE INCREASE



TOMATOES (ROUND/ ROMA)

PRICE DECREASE

TOMATOES (GRAPE/ CHERRY)

PRICE INCREASE

Special ALERTS

TOMATOES (ROUND & ROMA)



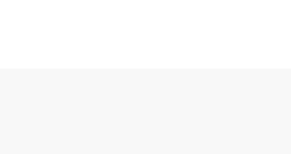
Round and Roma tomato markets have stabilized, with good-quality product from Florida and Mexico and prices slightly lower than earlier in the season. Snacking tomatoes (grape/ cherry) are the main pressure point, with shorter Mexican volume and strong domestic retail pulls driving higher prices.

LEAFY GREENS (ICEBERG, ROMAINE, ROMAINE HEARTS, GREEN/RED LEAF)



All lettuce markets outside Salinas are at extreme trigger levels as disease pressure (including INSV), heat, and lighter field weights reduce harvestable acreage. Iceberg and romaine remain highly escalated, with prorates likely, while green and red leaf are also tight, though less severe; quality risks include fringe burn, wind damage, mildew, and lighter heads.

LIMES & SMALL CITRUS



The supplies are improving overall, with strong volume in smaller 230/250 counts, but 175s and larger remain very tight and require ongoing substitutions to smaller sizes. Quality issues such as oleocellosis and skin scarring persist. Small fruit across lemons, navels, and Valencias is in short supply as crops peak in larger sizes, tightening 113/138 counts and keeping those sizes elevated until more imports arrive in July.

BERRIES

Strawberries are in relatively good shape, with solid volume and quality from Watsonville and Salinas, though warm weather can still cause occasional softness and bruising. Blueberries and blackberries, however, are on watch as Mexican seasons wind down and California faces heat- and weather-related slowdowns; supplies should improve as the Pacific Northwest ramps up over the next 1-2 weeks.

MELONS (CANTALOUPE, HONEYDEW, WATERMELON)

Cantaloupe and honeydew supplies are extremely limited as Yuma and Mexico wind down and new regions are not yet in full production, keeping prices very high and availability tight across sizes. Watermelon supply is concentrated in Georgia and Florida, forcing the Southeast to cover national demand during the holiday and driving prices higher through at least mid-July, despite overall good quality.