



Weekly Market Review February 26, 2026

Overview

Tight market conditions continue across the vegetable category. Cool weather in Mexico and the freeze in Florida continue to impact production of Tomatoes, Cucumbers, Squash, Beans, Bell Peppers, and Corn. Supply chain challenges, including limited equipment, driver delays, and overall transportation shortages amid strong demand, are adding pressure. We are receiving Act of God Declarations from the grower community in Florida on several commodities. Table Grape supply remains steady, with Red Grapes readily available and Green Grapes tighter. Limes are slightly softer with larger sizes easier to source. Banana supplies are expected to tighten due to strong global demand and virus-related issues, creating potential spot market pressure.

Tomato Quality:

We will continue to see pressure on the tomato supply chain over the coming weeks as we navigate these markets. Color will be a major concern with vine ripens out of Mexico; with the lighter volume and high demand, the frequency in inventory turns is much higher which does not allow that ripening process at shipping point forcing more handling post-harvest. We recommend several actions throughout the supply chain, such as running trucks warmer to advance the ripening process, wrap pallets in transit, as well as in your inventory. Storing fruit in warmer areas in warehouses as well as back of house at store level is also recommended. These processes will assist in color management throughout the supply chain during this current market condition.

Fruit

Cantaloupe volume remains stable with an increase in production over the next three weeks. Honeydews, however, are trending in the opposite direction with reports of Downy Mildew hitting fields in Guatemala and Honduras. Pineapple availability is slightly better, but size flexibility is requested. Avocado production in Mexico has returned to normal after the USDA halted work for 48 hours due to some unrest. Large and jumbo sizes are plentiful, while small sizes remain tight. Strawberry volumes continue to see slight improvements week over week, while Blueberries remain constrained by weather disruptions and seasonal transitions, keeping markets much higher. Cold weather and frost continue to impact supply and production in Guatemala. In addition, ongoing port congestion in Guatemala and Honduras continues. Recent frost events are expected to impact French beans, sugar snap peas, snow peas, and baby peeled carrots, further tightening already limited supplies.

Yuma

The warm weather in Yuma continues. The adverse weather has created widespread mildew issues and increased insect pressure affecting Lettuce, Romaine, and Tender Leaf items, specifically Arugula and Spring Mix, limiting harvestable acreage and shortening shelf life. Carrots, Celery, and Green Onions continue to be constrained by storm damage and disease, with full recovery not expected until mid-March. Broccoli and Cauliflower are still escalated but are no longer at the extreme level. There is still potential of prorates up to 30%. Broccolini is at the extreme level and is experiencing prorates as severe as 50% with most growers. Other crops including Cilantro, Anise/Fennel, Leeks, and Napa Cabbage are also limited. Growers anticipate intermittent supply gaps and early Yuma season completion, creating potential market instability. Insect pressure is becoming very prevalent.

Citrus

California Citrus supply is generally good, with strong availability in large sizes for Lemons, Cara Caras, and Mandarins. However, there is a significant strain on smaller navel sizes, with little to no 113/138s available and pressure on 88s, necessitating an increased likelihood of offering 72s. Some Valencias are available in Texas. Minneolas, Bloods, and Pummelos also have good large-size availability. Rio Reds Grapefruits are available out of both Texas and California. Please note that the previous rain forecast in California may have lingering effects on harvesting. Please work closely with your citrus supplier and be prepared for substitutions!

We continue to see an approximate 10% shortage nationwide due to enforcement of government safety regulations. Freight rates remain high, and significant volatility will continue. Carriers tend to prioritize produce shipments only when freight rates are competitive and convenient; otherwise, they shift capacity to other industries, further tightening availability for fresh products.

Alert List

- Asparagus – **EXTREME**
- Bok Choy – **ESCALATED**
- Blueberries – **EXTREME**
- Broccoli/Florets/Crowns– **ESCALATED**
- Broccoli Crowns Asian Cut/Organic – **EXTREME**
- Broccolini – **EXTREME**
- Cauliflower – **EXTREME**
- Celery/Celery Sleeved – **EXTREME**
- Cilantro – **ESCALATED**
- Green Beans – **EXTREME**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Hot Pepper: Red Fresno, Caribe and Shishito – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce – **ESCALATED**
- Lettuce Cello/Wrapped – **ESCALATED**
- Limes – **ESCALATED**
- Napa – **ESCALATED**
- Green Onions – **EXTREME**
- Parsley Italian – **ESCALATED**
- Romaine – **ESCALATED**
- Romaine Hearts – **ESCALATED**
- Snow Peas & Sugar Snap Peas – **ESCALATED**
- Strawberries – **ESCALATED**
- Sweet Corn – **EXTREME**
- Tomatoes (Rounds and Roma Tomatoes)
 - Mexico and Florida – **EXTREME**
- Tomatillos – **ESCALATED**

- Warm Veg Category (Florida) Corn, Beans, Cucumber, Soft Squash, Bell Pepper, Eggplant – **EXTREME**
- White Asparagus – **ESCALATED**

- Honeydews – **ESCALATED**

Watch List

1. Bananas
2. Cabbage, Red
3. Cabbage, Green
4. Lettuce, Red Leaf/Green Leaf
5. Herbs
6. Small Lemons
7. Pineapple
8. Ginger
9. Cantaloupe
10. Raspberries
11. Small Citrus Sizes across all Varieties

Weather

YUMA, AZ

Thu 2/26	Fri 2/27	Sat 2/28	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5
95° 64°F	97° 65°F	98° 65°F	96° 66°F	90° 58°F	84° 57°F	87° 59°F	84° 59°F
							
Sunny	Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Sunny	Sunny

OXNARD, CA

Thu 2/26	Fri 2/27	Sat 2/28	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5
71° 59°F	79° 58°F	74° 55°F	70° 54°F	66° 52°F	67° 52°F	68° 52°F	68° 52°F
							
Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny

CULIACAN, SINALOA

Thu 2/26	Fri 2/27	Sat 2/28	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5
92° 60°F	93° 61°F	92° 62°F	94° 62°F	93° 64°F	92° 63°F	92° 60°F	92° 59°F
							
Sunny	Sunny	Partly Cloudy	Sunny	Sunny	Partly Cloudy	Sunny	Sunny

HERMOSILLO, SONORA

Thu 2/26	Fri 2/27	Sat 2/28	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5
106° 68°F	101° 64°F	101° 64°F	103° 65°F	101° 63°F	94° 59°F	91° 58°F	90° 57°F
							
Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny

JALISCO, NAYARIT

Thu 2/26	Fri 2/27	Sat 2/28	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5
83° 54°F	83° 55°F	83° 56°F	85° 57°F	83° 57°F	82° 57°F	82° 56°F	82° 55°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

VIZCAINO, BAJA SUR

Thu 2/26	Fri 2/27	Sat 2/28	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5
93° 59°F	93° 60°F	92° 60°F	93° 61°F	93° 62°F	92° 61°F	92° 61°F	92° 59°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny

PLANT CITY, FL

Thu 2/26	Fri 2/27	Sat 2/28	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5
81° 56°F	83° 65°F	78° 59°F	81° 59°F	84° 62°F	84° 63°F	86° 65°F	88° 66°F
							
Partly Cloudy	Mostly Cloudy	AM Thunderstorms	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny

IMMOKALEE, FL

Thu 2/26	Fri 2/27	Sat 2/28	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5
83° 60°F	89° 65°F	85° 62°F	84° 61°F	87° 63°F	86° 64°F	86° 65°F	89° 64°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny	Mostly Sunny	Isolated Thunderstorms

Fruits & Vegetables

Tariff Update: *President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.*

Avocados: Mexico had a 64.2-million-pound harvest for week 8, with 63.3 million pounds shipped to the U.S. Sizing continues to peak toward 40s-60s counts, while dry matter has climbed to 32%. There is still plenty of availability and the occasional sight of Lenticel due to rain throughout the season.

Bananas: WATCHLIST Banana supply will begin to tighten over the coming weeks as global demand increases and production in the tropics steadily declines. A combination of virus pressure, low yields, and increasing production costs has placed significant strain on this staple commodity. Overall, Banana quality remains very good, and supply is adequate. The key to navigating the coming year will be consistency in supply, consistent ordering patterns, and staying proactive to address any potential issues that could impact the program.

Pineapples: WATCHLIST The Pineapple market has begun to settle slightly but remains tight. Demand continues to be high, keeping pricing stable. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, quality and taste are good.

Table Grapes: Quality is outstanding, and Brix are hitting the high teens. We seem to be in a good stride with stable availability on all three colors. Green varieties available: Sweet Globes. Red varieties: Red Globes, and Sweet Flavor. There are also generic varieties on all three colors available this week.

Berries

Strawberries: ESCALATED Overall volumes continue to increase after the freeze and rainfall weather events. California's growing regions have seen increased temperatures this week. There is notable water damage in ripe fruit currently being stripped from the fields, with additional impact expected in green fruit, blooms, and plant structure as crews continue field evaluations this week. Teams will be highly focused on aggressive sorting to ensure the best available fruit is selected for fresh packs. Central Mexico production continues to taper as the region moves deeper into the late season. Overall quality remains good, though increasing daytime temperatures are contributing to reports of overripe fruit and minor bruising. Sizing is trending small to medium. Florida production has rebounded following recent freeze events, with volumes increasing this week and expected to hold through mid next week. However, freeze damage to early-stage fruit and flowers may begin surfacing in upcoming harvests, potentially creating gaps or uneven sizing in certain fields. Overall, pack quality has remained good, and frost protection efforts have helped preserve much of the crop.

Blackberries: Production continues in Central Mexico and Baja with good overall availability. Quality remains good, though some softness and occasional red cell or color reversion are being observed as a result of recent heat, rain, and humidity.

Raspberries: WATCHLIST Production remains active in Central Mexico and Baja; however, supplies are tightening as crops move past their seasonal peak, with reduced availability expected over the next 6–8 weeks. Overall quality remains good.

Blueberries: EXTREME Production remains active in Central Mexico; however, supplies are extremely tight as crops move beyond seasonal peak volumes. Mexican quality and sizing continue to perform well, but overall availability is expected to remain limited over the next several weeks as both South American and Mexican volumes decline, and early Florida production may not contribute meaningfully in March. Early reports indicate 80–85 percent crop loss in Florida due to freeze events, which could have significant implications for the spring Florida blueberry crop and further tighten markets.

Citrus

Limes: ESCALATED Supply is much lighter this week out of Mexico, Columbia and Peru due to cooler weather and rain in January. Size profile continues to be heavy to the smaller fruit as of this week. As we get deeper into the new crop, we are starting to see more larger fruit out of Mexico due to the rain in Southern Mexico. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability expected through March.

California:

- **Lemons:** Good availability in all sizes across Central Valley, Ventura Co., Coachella Valley, and Yuma. Fruit is leaning towards fancy grade, peaking on 140s and larger. 165s/200s are a bit snug. Domestic Meyer lemons are available to load in D1.
- **Navels:** Manifest is peaking on 72/88s. Domestic Navels are available. Limited 113/138s available, which has been impacting 88 availability; be prepared for 72s to be offered. Good supplies on 72s and larger.
- **Cara-Cara Navels:** Peaking on 72/88s with all sizes available. Similar to Navels, smaller sizes (113/138) are strained and fruit is peaking large, so sizing up is recommended. Loadings in the Central Valley.
- **Mandarins:** Mandarins are back and ready. California Mandarins are peaking on larger sizes (12/15/18s).
- **Minneolas:** All sizes are available, with a focus on larger sizes. Small sizes are tight, so sizing up is advised.
- **Bloods:** Ready to go with large sizes available.
- **Pummelos:** Good volume on 6/8/10s, available in bulk bins.
- **California Rio Red Grapefruit:** Rio Red Rubies are now available. 36/40s are tight.

Texas:

- **Navels / Texas Valencias:** Texas Valencias are available and peaking on 72/88s. Plan to have Valencias through April.
- **Texas Rio Red Grapefruit:** Peaking on 48/36s. Large sizes are snug. Plan to have grapefruit through April. (Consider Texas for grapefruit if CA is out).

West Coast Lettuce

Iceberg: ESCALATED Lettuce quality and supplies are just okay and weights will be light. The market is active and weather has affected both harvesting and quality. Growers expect yields to be low because of insect pressure, mildew damage and cap leaves. Quality will be hit or miss. Shortened shelf-life issues should be expected.

Iceberg VA: ESCALATED Quality and supplies are just okay. We have seen reports of short shelf life, insect pressure and mildew in bags.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, fringe burn, light weights and mildew on the outer leaves. Growers are holding to averages. Hearts are now at the extreme trigger. Supplies will continue to tighten up as we get into March.

Romaine VA: ESCALATED Quality and supplies are okay. We have seen more core in the bags and some mildew.

Boston/Butter Lettuce: Quality and supplies are good. Mildew and fringe burn pressure have been observed.

Green Leaf, Better Burger and Red Leaf: Quality and supplies are good for now. Mildew and fringe burn pressure persist, and carton weights remain light.

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Green Bell Pepper: EXTREME Very light supply out of Mexico this week and quality will be mixed due to a combination of weather and insect pressure while supply will be extremely short out of South Florida due to freeze losses. Markets are much higher this week and expected to be volatile through Mid-April.

Color Bell Pepper: ESCALATED Lighter volume expected to continue out of Mexico due to cooler weather and insect pressure impacting yields while Florida will see very short supply due to last month's freeze. Markets are expected to be volatile through April. The Hot House Pepper category may see some volume in the next cycle that may bring some relief to this market over the coming weeks.

Mini Sweet Pepper: Supply will be stable over the next few weeks. Quality remains good.

Mixed Chili Pepper: ESCALATED Supplies are good out of Sinaloa and Sonora. Markets will be shorter this week on Caribe, Fresnos, and Shishito Pepper. We hope to see improvement next week on the short items. We do anticipate shorter availability on Anaheim and Poblano as Lent approaches; these items are a staple for stuffing with cheese and crab meat during the Holy season.

Tomatillo: ESCALATED We are starting to see some improvement on supply this past week. Quality and availability will continue to improve over the next 7 days. Markets to remain firm as demand shifts from the east to Mexico after last month's freeze.

Eggplant: EXTREME Domestic supply is very light this week out of Florida due to the freeze while crossings through Nogales remain strong. Best quality is out of Mexico.

Slicer Cucumbers ESCALATED: Supply crossing through Nogales and McAllen are lighter this week as we pass peak production. Quality is mixed. Florida will be short due to last month's freeze and outside sourcing will be most likely for the Florida east coast markets out of Honduras and Dominican Republic. Market volatility is expected through April.

English Cucumbers: Lighter supply and moderate demand have pushed pricing higher this week out of Nogales and McAllen. Quality is good.

Pickles: Lighter crossings through Nogales and McAllen. Quality is good.

Green Beans EXTREME: Supply will be extremely short out of Florida due to last month's freeze. Expect to see volatility over the next several weeks. We are receiving Act of God declarations. Markets prices continue to increase daily, and quality is fair on what is available. Mexico is also seeing lighter availability due to cooler weather slowing down production. We expect this to continue through early April.

French Beans: ESCALATED Supply is extremely limited out of Guatemala due to recent cold weather and frost events. Mexican French bean availability remains constrained as cooler temperatures continue to impact yields.

Zucchini/Yellow Squash: EXTREME Supply is very short in Florida due to last month's freeze combined with lighter crossing through Nogales/McAllen are pushing markets higher. Best quality is out of Mexico. We expect to see volatile markets through March.

Herbs: WATCHLIST Basil production and quality remain inconsistent due to cold weather in Mexico, heavy rainfall in Colombia, and ongoing USDA holds and fumigations. Cooler conditions continue to contribute to variability, with occasional tip burn possible during the winter months. Imported chervil supply has improved. Overall, other herb supplies are steady with fair quality, with the exception of tarragon, which remains more limited. Arugula and Cilantro are extremely limited from some growers and prorates should be expected.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Limited	USA
Basil	Steady	Steady	USA/MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Limited	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Limited	Limited	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons WATCHLIST

Cantaloupe: There is a good mix of 9/12s available, while 15s are starting to increase. Quality overall continues to be good. Brix levels mostly range from 12-14%.

Honeydew: ESCALATED Fields in Guatemala and Honduras are reporting Downy Mildew, a virus that attacks the leaf coverage of the plant and drastically reduces yield, melon size and brix level. Suppliers feel this will last at least a month. Larger fruit will remain tight during this time, and flexibility on sizing will be required.

Watermelon: The market on seedless melons remains steady even with less Mexican crossing this week. Cooler temperatures in Guatemala have seen Watermelon production drop significantly and a shift in size from 45's to 36's. The freezing temperatures in Florida will likely play a role in early production set to start at the end of the month.

Mixed Vegetables

Artichokes: Quality and supplies are both good.

Asparagus: EXTREME Mexican production remains limited due to cooler weather in the San Luis and Caborca regions, while Peruvian volumes continue to decline seasonally. Despite reduced output from both origins, markets have remained relatively steady. Supplies are expected to stay tight over the next two weeks.

Bok Choy: ESCALATED Quality and supplies are okay.

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is okay and supplies have tightened up. The rain and the warmer weather that Yuma experienced has led to quality issues that will remain for the next few weeks. Reports of browning and pin rot continue. Growers are holding to strict averages when they can but we are seeing prorates as severe as 50%.

Broccolini and Sweet Baby Broccoli: EXTREME Quality is good, but supplies are extremely limited with most growers. Weather has affected harvesting and quality. Growers are holding to strict averages, when possible, but we are seeing prorates as severe as 50% from most growers.

Brussels Sprouts: Supplies and quality have improved. We are still combating insect pressure and internal browning but overall, quality is good. The market is no longer escalated and supplies should continue to improve as we shift growing regions.

Carrots (JUMBOS, MEDIUMS and CELLOS): Due to continued rain events, supplies are tight on Baby Carrots, Cellos, and Jumbos, with limited availability. Rainbow Carrots remain steady with good quality and supply. Harvesting has been challenging because of muddy fields. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Rainfall has affected harvesting for all of the growers. Cellos and Jumbos are the most heavily impacted. Prorates should be expected. Availability will remain limited until conditions improve. There are Jumbos available in GA if you could load there. ***Growers request orders be sent in as early as possible. At least 7-10 days ahead of time.***

Cauliflower: EXTREME Quality is okay, but supplies have tightened up. The market remains at the extreme level.

Celery: EXTREME Quality is good, and supplies are still limited. Weather has affected harvesting and quality. Growers are holding to strict averages on VA and Carton Celery. We will not see full relief until April.

Corn, Sweet: EXTREME The west has reacted to the shortfalls out of Florida and is now seeing historically high prices across all markets. Florida has lost an estimated 80 percent of its current production cycle due to the freeze while Mexico production remains very light. Act of God Declarations on program business. We expect to see volatile markets through April. Quality will be fair at best and we are seeing attributes such as small ear and immature kernels amid this production shortfall as growers in Florida are basically salvaging what they can from their crops.

Fennel: ESCALATED Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

Kale: Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

Leeks: ESCALATED Quality and supplies look okay.

Garlic: Quality remains good, although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and market are steady.

Green Cabbage: WATCHLIST Supplies and quality are good, but the market is tightening up. We had added this to the watchlist as we expect supplies to tighten up as we get into March.

Green Onions: EXTREME Supplies are extremely limited and quality is okay. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging as we close in on transition. Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to very strict averages, when possible, but prorates should be expected.

Mushrooms: Supply is expected to be steady for the next several weeks. Quality is good.

Napa Cabbage: Quality is good, but supplies are tight. The market is increasing.

Parsley (Italian & Curly): Supplies and quality are good.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

Red Cabbage: WATCHLIST Quality looks good, but supplies are light.

Spinach: Supplies remain limited. Reports of weak texture, discoloration, and wilting continue. We are also now seeing disease pressure and mildew which are further impacting yields.

Spring Mix: Supplies are limited this week. Weather has affected harvesting and quality, causing additional supply issues. We are also now seeing disease pressure and mildew which are further impacting yields.

Snow Peas and Sugar Snaps: ESCALATED Guatemalan snow pea supplies are good, and sugar snap availability has improved. Mexican snow pea and sugar snap volumes remain limited as growers work through field transitions.

Onions:

The onion market remains stable. With harvest concluded, all products will ship exclusively from storage in the Pacific Northwest. While modest increases may occur, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

Potatoes:

Potato supply for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

Tomatoes:

Tomato Suspension Agreement Update

Currently, duties are being imposed on Mexican tomatoes. We do expect to see some reporting from the ITC on the impacts of duties and anti-dumping violations sometime this year. NO major immediate changes are anticipated.

Tomato Quality: We will continue to see pressure on the tomato supply chain over the coming weeks as we navigate these markets. Color will be a major concern with vine ripens out of Mexico; with the lighter volume and high demand, the frequency in inventory turns is much higher which does not allow that ripening process at shipping point forcing more handling post-harvest. We recommend several actions throughout the supply chain, such as running trucks warmer to advance the ripening process, wrap pallets in transit, as well as in your inventory. Storing fruit in warmer areas in warehouses as well as back of house at store level is also recommended. These processes will assist in color management throughout the supply chain during this current market condition.

East Coast

- **Round and Roma Tomatoes: EXTREME** Markets are expected to be volatile through early May and hit or miss supply over the coming weeks as growers attempt to salvage what they can. We will continue to assess the freeze impacts with our growers and provide updates as soon as possible. We do expect the need to sub sizes and varieties to navigate this unprecedented weather event and are receiving Act of God Declarations from our Florida Partners.
- **Snacking Tomatoes: Grape Medley, Grape Tomato, Cherry Tomato: EXTREME** Supply was very short this week, and pricing was higher on cherry tomatoes and medley tomatoes; grapes were somewhat stable as it felt like there were a few more grapes on the market this week.

Mexico

- **Round Tomatoes: ESCALATED** Volume is slowly improving, and demand from the east is higher, offsetting the increase in volume. We will see stronger markets with very high FOB prices established over the next ten days. Quality remains very good through McAllen and Nogales.
- **Roma Tomatoes: ESCALATED** Projections are down by over 30% due to late season blight impacting production and quality combined with growers not planting the acreage they typically do during the normal Sinaloa season. This reduction in acreage is mainly due to the volatility of duties and the dismissal of the suspension agreement. Demand from the east is higher as well due to the freeze which will push markets to record highs. Quality is fair crossing through McAllen and Nogales. Expect volatility over the next 4 to 6 weeks.
- **Snacking Tomatoes:**
 - **Grape Tomatoes, Grape Medley and Cherry Tomatoes: ESCALATED** Lighter supply and higher demand from the east have pushed prices up a tad and expecting that trend to continue this week with the cold weather in Florida. Quality is outstanding.

Other Fruit:

Apples: The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes

that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

Pears: **D'Anjou** availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. **Red D'Anjou** pears are moderately available in US #1 35–55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Limited Supply out of Israel.

Asian Pears: Lighter volume, good supply on larger sizes.

Cherries: Lighter supply available out of Argentina and Chile.

Stone Fruit: Good supply on Peaches, Plums and Apricots currently out of Chile.

Papaya: Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

Mangoes: Good supply out of Mexico Peru and Puerto Rico. Varieties: Kents, Tommys, and Ataulfo.

Kiwi Fruit: Supplies fair out of California as well as offshore landing on the East Coast.

Quince: Limited supply available this week.