



# Weekly Market Review

## March 19, 2026

### Overview

Cucumber and Squash from Mexico are showing some supply relief while Tomatoes get tighter. In Florida, availability remains very short on Cucumbers while Squash availability improves. Florida will continue to experience significant shortages in Tomatoes, Beans, Bell Peppers, and Corn. Hot Peppers are also in very tight supply across all categories. Lime market is extremely short and expected for the next 3-4 weeks.

Yuma, Salinas, and Huron are all experiencing a heat wave. Triple digit temperatures are being reported. 25-30 degrees above normal for this time of year. These temperatures are expected to amplify insect pressure and affect quality as we move forward. Carrots, Celery, and Green Onions continue to face ongoing supply challenges. Full recovery is not expected until April and likely May for the Carrots. Broccolini remains at the extreme trigger and still has limited supplies but should see improvement over the next 2 to 3 weeks. Lettuce, Broccoli and Cauliflower show improved supplies this week, but growers anticipate intermittent gaps and early Yuma season completion, potentially leading to market instability.

Previous frost events in Guatemala have impacted French Beans, Sugar Snap Peas, Snow Peas, and Baby Peeled Carrots, further tightening already limited supplies. Cold weather and frost in Guatemala, combined with port congestion in Guatemala and Honduras, are contributing to these issues. Table Grape supply is steady, with Red Grapes readily available and Green Grapes tighter. Lime availability will decrease due to reduced volume from Veracruz, Mexico, leading to higher markets and less availability across all sizes. Efforts are underway to secure alternative supplies from Colombia. Banana supplies are expected to tighten due to strong global demand and virus-related issues.

Cantaloupe volume remains strong, and we should see some relief on Honeydew supplies as some suppliers have switch fields. Pineapple availability has slightly improved, with a request for size flexibility. Avocado supplies are steady with plenty of large and jumbo sizes from Mexico, while small sizes remain tight. Strawberry volumes are on the decline due to the current heatwave in California. Supplies are expected to decline due to heat-related issues over the next few weeks. Central Mexico and Florida seasons should be ending in the next few weeks. Blueberry and Raspberry volumes remain very low, with continued prorates. Blueberries are expected to see relief towards the end of April as the Georgia season comes online.

Citrus markets are experiencing tight supplies on smaller sizes across many varieties, including Lemons, Navels, Cara-Caras, Minneolas, and Blood Oranges, with fruit generally trending large. Domestic Meyer Lemons are available, while California Valencias are expected in mid-to-late April. Mandarin availability is mixed, and Grapefruit supplies from California and Texas are currently available. Please note that the heat wave that hit the central valley will impact quality and production.

### Alert List

- Asparagus – **ESCALATED**
- Bok Choy – **ESCALATED**
- Blueberries – **EXTREME**
- Broccolini – **EXTREME**
- Carrots – **EXTREME**
- Cauliflower – **ESCALATED**
- Celery/Celery Sleeved – **ESCALATED**
- Green Beans – **EXTREME**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Honeydews – **ESCALATED**
- Hot Pepper: All Varieties – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce – **ESCALATED**
- Limes – **EXTREME**
- Napa – **ESCALATED**
- Green Onions – **ESCALATED**
- Parsley Italian – **ESCALATED**
- Raspberries – **EXTREME**
- Romaine – **ESCALATED**
- Romaine Hearts – **ESCALATED**
- Strawberries – **ESCALATED**
- Sweet Corn – **EXTREME**
- Tomatoes (Rounds and Roma Tomatoes)
  - Mexico and Florida – **EXTREME**
- Tomatillos – **ESCALATED**
- Warm Veg Category (Florida) Corn, Beans, Cucumber, Bell Pepper, Eggplant – **EXTREME**
- White Asparagus – **ESCALATED**

### Watch List

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

**Weather**  
**YUMA, AZ**

Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26
106°   68°F	107°   70°F	107°   72°F	102°   66°F	96°   63°F	97°   64°F	101°   67°F	100°   68°F
							
Sunny	Sunny	Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Sunny

**OXNARD, CA**

Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26
78°   60°F	77°   58°F	71°   58°F	74°   58°F	74°   58°F	75°   59°F	75°   59°F	79°   60°F
							
Sunny	Mostly Sunny	Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy

**CULIACAN, SINALOA**

Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26
98°   61°F	98°   62°F	94°   65°F	91°   66°F	91°   65°F	93°   65°F	94°   65°F	93°   66°F
							
Sunny	Mostly Sunny						

**HERMOSILLO, SONORA**

Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26
107°   68°F	110°   69°F	106°   68°F	101°   68°F	99°   67°F	101°   67°F	103°   67°F	102°   69°F
							
Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny

**JALISCO, NAYARIT**

Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26
85°   56°F	85°   56°F	83°   56°F	79°   55°F	79°   55°F	82°   56°F	84°   57°F	83°   56°F
							
Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Mostly Sunny	Mostly Sunny

**VIZCAINO, BAJA SUR**

Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26
96°   61°F	96°   60°F	94°   62°F	90°   63°F	90°   62°F	93°   62°F	94°   63°F	93°   64°F
							
Sunny	Mostly Sunny						

**PLANT CITY, FL**

Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26
75°   48°F	79°   47°F	81°   51°F	83°   54°F	84°   57°F	85°   62°F	84°   61°F	87°   61°F
							
Mostly Sunny	Sunny	Sunny	Sunny	Sunny	PM Thunderstorms	Partly Cloudy	Mostly Sunny

**IMMOKALEE, FL**

Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26
78°   53°F	81°   53°F	84°   52°F	87°   55°F	88°   57°F	89°   61°F	88°   62°F	89°   62°F
							
Mostly Cloudy	Mostly Sunny	Sunny	Sunny	Sunny	Mostly Sunny	PM Thunderstorms	PM Showers

## **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 an 87.3-million-pound harvest for week 11, with 74.3 million pounds shipped to the U.S. Sizing continues to peak toward 40s-60s counts, while dry matter has climbed to 34%. There is still plenty of availability. Holy week is approaching fast, and we will see a reduction in harvesting. California reported a 2.9-million-pound harvest, although the dry matter is only around 26%.

**Bananas:** Banana supply will remain tight due to increased global demand and declining tropical production, exacerbated by virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana 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, the quality and taste are good.

**Table Grapes:** Quality is outstanding on red and black varieties with good sizing and brix are hitting the high teens. Greens are tighter this week and seem to be declining in availability. We are also seeing a bit more ambering in these. Green varieties available: Thompsons, Sweet Globes, Ivory and Autumn Crisp. Red varieties: Alisons, Red Globes, and Sweet Flavor. There are also generic varieties of all three colors available this week.

## **Berries**

**Strawberries: ESCALATED** Overall supplies are beginning to decline, and we will continue to see lower volumes over the next few weeks due to the current heatwave in the main growing region. California production is now active across all key regions. Leading up to this week, California saw favorable conditions that accelerated the season and delivered strong quality, with consistent sizing and appearance. However, California is currently experiencing a heatwave across all growing regions, which is causing sun scalding, increased berry sizing, and faster fruit breakdown. Baja production remains steady with good quality, while Florida continues to provide a stable supply for the next few weeks as the season approaches its close. Central Mexico is entering its final weeks of significant production for the U.S. market, with crossings into Texas expected to conclude this weekend.

**Blackberries:** Production continues in Central Mexico, though supplies have tightened in recent weeks as crops move past their seasonal peak, reducing overall availability. Volumes are expected to resume increasing by mid-March and stabilize as we move into April. The overall quality remains good.

**Raspberries: EXTREME** Supply and availability will remain limited throughout March and most of April. Pro-rates and potential cancellations should be expected based on daily supply conditions, and substitutions may occur on labels, organics, and pack styles when necessary. Several factors are contributing to the tight market, including Central Mexico reaching its lowest production levels as volumes decline from peak levels and fields are pruned in preparation for the next crop cycle. Additionally, ongoing reports of political unrest, violence, blockades, and operational disruptions continue to affect key growing regions, although these issues are receiving less national attention than in previous weeks. Central Mexico volumes are expected to remain low for the next 3 to 5 weeks, with meaningful recovery not anticipated until late April or early May. Some additional volume from Baja is expected to begin supplementing supply in early to mid-April. Overall production remains limited, though quality has been generally good.

**Blueberries: EXTREME** Production remains active in Central Mexico, but supplies are very tight as crops move past seasonal peak volumes. Mexican quality and sizing continue to perform well; however, overall availability will remain limited over the next several weeks as both South American and Mexican volumes decline, and the early Florida crop is expected to be significantly reduced. Many Florida growers are reporting crop losses of approximately 80–85 percent due to earlier freeze events, with some reporting losses of 50 percent or less.

## **Citrus**

**Limes: EXTREME** Supply will be very light this week out of Mexico as cooler weather and rain in January has impacted the current growing regions. We are seeing issues such as the size profile be heavy to the smaller fruit; we do anticipate this to improve over the next 3 to 4 weeks. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability expected through March and may need to shift supply from Mexico to Colombia to fill orders in certain cases.

**Lemons:** Some suppliers report fruit is leaning more towards a fancy grade and peaking on 140's. 165/200's are tightening up. Some suppliers will not take on new volume on smaller sizes until supplies improve. Domestic Meyer lemons are available!

**Navals:** Manifest is peaking on 72/88's. Extremely tight on 113's and 138's. This is also putting pressure on the 88's – be prepared to be offered 72's on many orders. Fruit is overall great quality! Just LARGE!

**Valencia's:** Some suppliers have limited TX Vals as an option. California Valencia's are set to begin mid – late April.

**Mandarins:** Suppliers are a bit of a mixed bag on Mandarins. Some suppliers have limited availability while others have plenty.

**Cara-Cara's, Minneolas, Bloods:** Still peaking large. Tight on the smaller sizes

**Grapefruit:** California Star Rubies now available. Availability in Texas through April!

### **West Coast Lettuce**

**Iceberg: ESCALATED** Lettuce quality and supplies are good but 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 good. 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 good. There have been reports of bruising, fringe burn, light weights and mildew on the outer leaves. Growers are holding to averages. Supplies are okay for now but will continue to tighten up as we get closer to transition.

**Romaine VA: ESCALATED** Quality and supplies are good. 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 several varieties: Jalapeno, Serrano, Caribe, Habanero, Fresnos, and Shishito Pepper.

**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 will begin to improve this week as we break new blocks in Sinaloa as well as Sonora. We will, however, see a split market and will still see firm prices due to Florida's losses from the freeze. 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:** Florida's supply continues to be severely impacted by last month's freeze, leading to extreme shortages and market volatility over the coming weeks. "Act of God" declarations are being issued as market prices continue to rise daily, and the quality of available produce is fair at best. Mexico is also experiencing lighter availability due to cooler weather slowing production. We expect market shortfalls and challenges through early April.

**French Beans: ESCALATED** Guatemalan supply remains extremely limited due to prior cold weather, frost, and ongoing rain. Mexican French bean availability is also limited, as cooler temperatures continue to impact yields.

**Zucchini/Yellow Squash:** Supply improving on green but light on yellow over the next week with newer blocks coming on in Florida as well as Mexico. We should see better availability over the next week as well as much needed price relief.

**Herbs: WATCHLIST** Basil production and quality remain impacted by cold weather in Mexico, heavy rainfall in Colombia, and ongoing USDA holds and fumigation requirements. Imported chervil supply has improved out of Ecuador, while tarragon remains fairly limited.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	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	Limited	Steady	USA
Oregano	Steady	Good	USA
Italian Parsley	Limited	Limited	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA/MX
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Limited	Steady	MEX
Thyme	Steady	Steady	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. Some suppliers were able to get into some different fields early and will offer some relief to the market. The newer field will also offer an even size profile.

**Watermelon:** Import melons are finishing up, and we are a month away from Florida starting. This will put extra pressure on the Mexican supply, keeping price firm.

#### **Mixed Vegetables**

**Artichokes:** Quality and supplies are both good.

**Asparagus: ESCALATED** Mexican production in San Luis and Caborca remains somewhat steady; however, elevated temperatures are impacting yields and increasing seeding. Additionally, we see an increase in feathered tips. Peruvian production is expected to begin within the next two to three weeks. Markets have continued to strengthen due to Easter demand and higher fuel costs, with pricing expected to trend upward over the next few weeks.

**Bok Choy: ESCALATED** Quality and supplies are okay.

**Broccoli Florets/Broccoli Crowns:** Quality is good but supplies are still light with some growers. The warmer weather that Yuma is experiencing is expected to lead to quality and supply issues. Reports of browning and pin rot continue.

**Broccolini and Sweet Baby Broccoli: EXTREME** Quality is good, but supplies remain limited with most growers. Weather has affected harvesting and quality. Growers are holding to averages but expect supplies to improve over the next 2-3 weeks.

**Brussels Sprouts:** Supplies and quality have improved. We are still combating insect pressure and internal browning but overall, quality is good. Supplies should continue to improve as we shift growing regions.

**Carrots (JUMBOS, MEDIUMS and CELLOS): EXTREME** 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. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Weather 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 in late April, early May. **Growers request orders be sent in as early as possible. At least 7-10 days ahead of time.**

**Cauliflower: ESCALATED** Quality and supplies are good.

**Celery: ESCALATED** Quality is good, and supplies are still limited but improving weekly. Weather has affected harvesting and quality. Growers continue to hold to averages. 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: ESCALATED** Supplies are limited and quality is good. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging as we close in on transition. Growers are holding to averages, but the market is trending down. We should see full relief in April.

**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 and quality are okay. 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:** Guatemalan snow pea and sugar snap supplies are good. Mexican supply remains fair at best as growers continue working through field transitions.

#### **Onions:**

The onion market remains stable. With harvest concluded, all products in the Pacific Northwest will ship exclusively from storage. Fresh onions have started in Texas, with California and New Mexico getting going in late April. 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** Florida will see its lightest production week of the season this coming week, and markets will remain volatile through early May. 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:** 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 will gradually improve as Sonora starts to bring additional volume to market, however we continue to see stronger markets. Quality remains very good through McAllen and Nogales.
- **Roma Tomatoes: EXTREME** There is a huge variance in quality and price this week; older production out of Sinaloa is riddled with Blight and quality is compromised while new production out of Sonora is strong and will call for a premium. Romas will run short over the next few weeks, and volatility in markets will change daily. We are suggesting moving to rounds where possible during this market condition.
- **Snacking Tomatoes:**
  - **Grape Tomatoes, Grape Medley and Cherry Tomatoes:** Lighter supply and lighter demand has put upward pressure on price this week. 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.