

Weekly Market Review

March 6, 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 will get tighter as volume decreases out of Veracruz Mexico; we will see higher markets and less availability across all sizes this week. We are seeking alternative supply out of Columbia to offset the shortfalls out of Mexico. Banana supplies are expected to tighten due to strong global demand and virus-related issues, creating potential spot market pressure.

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-ripes 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. Cantaloupe volume remains stable with an increase in production over the next three weeks. Honeydews, however, are trending in the opposite direction with some reports of Downy Mildew hitting fields in Guatemala and Honduras. Pineapple availability is slightly better, but size flexibility is requested. Avocado supplies rebounded quickly following the shutdown. Mexico's production has returned to normal with minimal impact on pricing. Large and jumbo sizes are plentiful, while small sizes remain tight.

Overall Strawberry volumes continue to increase out of Florida and California, while Mexican production continues to wind down seasonally, helping stabilize markets. Blueberry and Raspberry volumes have declined significantly this week and prorates are likely over the next several weeks especially on raspberries. Ongoing unrest across several Mexican states is disrupting agricultural regions, with security concerns affecting field operations, labor, packing facilities, and transportation logistics, resulting in expected volume reductions over the next 3–6 weeks. 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.

The warm weather in Yuma continues. The adverse weather has created widespread mildew issues and increased insect pressure affecting Lettuce, 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. Cauliflower, Celery, Green Onions and Broccoli all remain at the extreme level. Broccoli supplies are better this week but Broccoli is still extremely tight and is experiencing prorates. 80% of averages from some growers should be expected. 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.

Overall Citrus supplies are solid but skewed toward larger fruit— California and Oxnard lemons are available across sizes and trending fancy/140+ (165/200 a bit snug). Navels and Cara-Caras are peaking on 72/88 counts with 113/138 tight (expect substitutions to 72s). Mandarins are supplier-dependent (some shippers tight, others comfortable). Bloods and Minneolas are heavy to larger sizes with promo volume available but small Minneolas are tight. California Rio Red grapefruit is available. From Texas, Valencias are peaking on 72s and Grapefruit is shipping on 36/40s, with supplies expected through April. Recommendation: size up where possible and stay in close contact with suppliers to confirm allocations.

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 – **ESCALATED**
- Bok Choy – **ESCALATED**
- Blueberries – **EXTREME**
- Broccoli/Florets/Crowns– **ESCALATED**
- Broccolini – **EXTREME**
- Cauliflower – **EXTREME**
- Celery/Celery Sleeved – **EXTREME**
- Cilantro – **ESCALATED**
- Green Beans – **EXTREME**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Honeydews – **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**
- Raspberries – **EXTREME**
- Romaine – **ESCALATED**
- Romaine Hearts – **ESCALATED**
- Snow Peas & Sugar Snap Peas – **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**

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

11. Strawberries

10. Small Citrus Sizes across all Varieties

Weather

YUMA, AZ

Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12
80° 51°F	75° 53°F	78° 57°F	85° 58°F	76° 56°F	80° 56°F	86° 60°F	94° 64°F
							
Sunny/Wind	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny

OXNARD, CA

Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12
71° 50°F	70° 52°F	76° 54°F	81° 55°F	69° 55°F	66° 53°F	69° 55°F	76° 58°F
							
Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Partly Cloudy	Sunny	Partly Cloudy

CULIACAN, SINALOA

Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12
92° 65°F	90° 66°F	89° 64°F	88° 63°F	84° 60°F	87° 54°F	93° 56°F	97° 58°F
							
Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Cloudy	Sunny	Sunny	Sunny

HERMOSILLO, SONORA

Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12
88° 53°F	86° 51°F	85° 57°F	84° 58°F	76° 53°F	80° 54°F	92° 60°F	99° 61°F
							
Sunny	Mostly Sunny	Sunny	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny

JALISCO, NAYARIT

Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12
80° 54°F	80° 54°F	80° 56°F	78° 56°F	78° 56°F	78° 52°F	83° 54°F	85° 57°F
							
Sunny	Mostly Sunny	Mostly Sunny	Mostly Cloudy	Partly Cloudy	Mostly Sunny	Sunny	Sunny

VIZCAINO, BAJA SUR

Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12
91° 64°F	90° 63°F	89° 63°F	87° 62°F	84° 60°F	88° 54°F	94° 58°F	97° 60°F
							
Partly Cloudy	Sunny	Partly Cloudy	Partly Cloudy	Cloudy	Mostly Sunny	Sunny	Sunny

PLANT CITY, FL

Thu 3/5 87° 68°F  PM Thunderstorms	Fri 3/6 90° 68°F  Partly Cloudy	Sat 3/7 89° 66°F  Partly Cloudy	Sun 3/8 89° 66°F  Mostly Sunny	Mon 3/9 90° 66°F  Mostly Sunny	Tue 3/10 91° 68°F  Sunny	Wed 3/11 91° 68°F  Mostly Sunny	Thu 3/12 88° 64°F  PM Thunderstorms
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IMMOKALEE, FL

Thu 3/5 89° 68°F  PM Showers	Fri 3/6 91° 67°F  PM Showers	Sat 3/7 90° 65°F  Partly Cloudy	Sun 3/8 91° 65°F  PM Thunderstorms	Mon 3/9 91° 65°F  Mostly Sunny	Tue 3/10 91° 67°F  Mostly Sunny	Wed 3/11 91° 66°F  Mostly Sunny	Thu 3/12 90° 64°F  PM Thunderstorms
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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 65.6.2-million-pound harvest for week 9, with 54.2 million pounds shipped to the U.S. Sizing continues to peak toward 40s-60s counts, while dry matter has climbed to 33%. There is still plenty of availability and the occasional sight of Lenticel due to rain throughout the season.

Bananas: WATCHLIST 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, 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: WATCHLIST Overall volumes continue to increase out of Florida and California, while Mexican production continues to wind down seasonally. Markets have stabilized due to increased volumes. Warmer temperatures in California have allowed fields to dry out and harvest activity to improve. Central Mexico production is tapering as the region moves deeper into the late season; overall quality remains good, though warmer daytime temperatures are contributing to some overripe fruit and minor bruising, with sizing 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 blooms may begin to appear in upcoming harvests, potentially

creating gaps or uneven sizing in some fields, though overall pack quality remains good due to effective frost protection measures.

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: EXTREME Volumes significantly this week, and we will likely see prorates over the next few weeks. Recent unrest across several Mexican states following the killing of cartel leaders has created significant disruption, including violence, blockades, and infrastructure impacts. These conditions are affecting rural agricultural regions, particularly areas producing raspberries. Early reports indicate significant reductions in expected volumes over the next 3-6 weeks as security concerns impact field operations, labor availability, packing and cooling facilities, and transportation logistics moving product toward the border.

Blueberries: EXTREME Production remains active in Central Mexico; however, supplies are extremely tight out of Mexico. Volumes continue to decline significantly, and we will likely see prorates over the next few weeks. Recent unrest across several Mexican states following the killing of cartel leaders has created significant disruption, including violence, blockades, and infrastructure impacts. These conditions are affecting rural agricultural regions, particularly areas producing blueberries. Early reports indicate significant reductions in expected volumes over the next 3-6 weeks as security concerns impact field operations, labor availability, packing and cooling facilities, and transportation logistics moving product toward the border.

Citrus

Limes: ESCALATED Supply is much lighter 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.

Lemons (California & Oxnard)

- Availability: Strong across all sizes in both reporting houses.
- Grade & Size: Fruit is leaning towards a fancy grade, with peak availability on 140s and larger. Sizes 165/200 are slightly snug but overall supply is in good shape.

Navels (Domestic)

- Availability & Sizing: The manifest is peaking on 72/88 counts.
- Tight Counts: There is a significant lack of 113/138 sizes, which is placing pressure on the 88s. Buyers should be prepared to receive 72s on many orders.
- Good Availability: Supplies are good for 72 count and larger.
- Origin: Domestic Navels are available from the Central Valley, with limited supply from Fillmore and Riverside.

Mandarins

- Availability: This is an area of supplier variability. Some shippers are reporting limited availability, while others have a comfortable supply.

- Recommendation: Maintain close contact with your suppliers to ascertain their current inventory levels and supply status.

Cara-Cara Oranges

- Availability & Sizing: All sizes are available, peaking on 72/88 counts. Similar to Navels, there is a lack of 113/138 sizes, and the fruit is trending larger.

Blood Oranges

- Availability: Large sizes are readily available. Promotional volume may exist where supply is strong.

Minneolas (Tangelos)

- Availability & Sizing: All sizes are available, with a primary focus on large fruit.
- Tight Counts: Small sizes are tight.

California Rio Red Grapefruit

- Availability: California Rio Red Grapefruit is currently available.

Texas Citrus Overview:

General Trends: Texas is offering Valencia Oranges and Grapefruit, with supplies expected to last through April.

- TX Valencia Oranges
 - Availability: Available, with the manifest peaking on 72s.
 - Duration: Expect Valencia supplies to continue through April.
- TX Grapefruit
 - Availability: Shipping this week, peaking on 36/40 counts.
 - Duration: Plan for Texas Grapefruit supplies through April.

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 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 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: 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 Supplies out of Guatemala are extremely limited due to recent cold weather and frost events. Mexican French bean availability also remains constrained as cooler temperatures continue to impact yields and reduced green bean volumes have added significant pressure to the French bean markets.

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	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. 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: ESCALATED Mexican production remains lower 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 7-10 days.

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 averages.

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 at 20% from some 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 Supplies of snow peas from Guatemala remain good, and availability of sugar snaps has improved. Mexican snow pea and sugar snap volumes continue to be limited as growers transition between fields.

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:** 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: 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. We are starting to see some relief out of Sonora bring some relief to the market this coming week. However, we do expect to see the volatility and elevated markets continue due to the crop losses in Florida. Quality is mixed, Fruit from Sinaloa is fair and new crop out of Sonora looks very nice.

- **Snacking Tomatoes:**

- **Grape Tomatoes, Grape Medley and Cherry Tomatoes:** Improving supply and lighter demand has put downward 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.