

## **Weekly Market Review**

**April 3, 2026**

### **Overview**

Tomatoes will start to hit critical supply levels this week, expect to see deep prorates and quality issues broaden. We do not expect any improvement for another 3-4 weeks. We recommend scaling back portions and removal from menus where possible. We will continue to see limited availability on the following items as well: Cucumbers, Green Beans, Bell Peppers, and Corn. Hot Peppers are also in very tight supply across all categories. Lime market is extremely short and is expected to be for the next 3-4 weeks. We expect to see harvest delays as well as border delays due to Holy Week celebrations in Mexico next week.

Yuma and Salinas are still experiencing hot weather. Broccoli has once again escalated due to limited supply and quality issues. Carrots continue to face ongoing supply challenges. Full recovery is not expected until May. Broccolini still has limited supplies but is no longer at the extreme trigger. Growers continue to hold to averages. Artichokes, Bok Choy and Napa have extremely limited supplies. Bok Choy and Napa are both at the extreme trigger. Supplies and quality are good this week on the majority of the Wet Veg items, but growers are anticipating that the hot temperatures will cause quality and supply issues as we head into transition.

Supply disruptions out of Guatemala due to roadblocks and transit delays have pushed container arrivals to midweek, leaving East Coast shippers either heavily prorated or completely out of Green Beans and French beans amid strong holiday demand. Additional items including Baby Carrots, Baby Zucchini, Peas, Broccoli Florets, and Radicchio are also impacted, with no local recovery options available due to prior freeze-related supply gaps in Florida. 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 steady, while Honeydew production has improved slightly, but overall remains limited. Pineapple availability has tightened up, with a request for size flexibility. Avocados from Mexico saw an increase of crossing last week to prepare Holy Week. Mexican growers will shut down for 3-4 days in observance of Easter. Overall, supply remains strong with California ramping up. Strawberry supplies have improved, though quality remains impacted by recent heat, while blackberry volumes are building toward peak despite ongoing pressure on firmness and grading. Raspberry and blueberry supplies remain very tight through April, with overall markets expected to improve as volumes increase and stabilize into May.

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, and 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.

Freight: Limited trucks and record high fuel costs are putting upward pressure on rates going into the holiday and beyond. We are seeing several freight companies, including sea freight companies, invoking fuel surcharges which will impact cost inputs.

**Alert List**









- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Bok Choy – **EXTREME**
- Blueberries – **EXTREME**
- Broccoli – **ESCALATED**
- Carrots – **EXTREME**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Green Beans – **EXTREME**
- Honeydews – **ESCALATED**
- Hot Pepper: All Varieties – **ESCALATED**
- Limes – **EXTREME**
- Napa – **EXTREME**
- Parsley Italian – **ESCALATED**
- Raspberries – **EXTREME**
- Strawberries – **ESCALATED**
- Sweet Corn – **EXTREME**
- Tomatoes (Rounds and Roma Tomatoes)
  - Mexico and Florida – **EXTREME**
- Tomatillos – **ESCALATED**
- Warm Veg Category Corn, Beans, Cucumber, Bell Pepper, Eggplant – **EXTREME**
- White Asparagus – **ESCALATED**

**Watch List**









1. Broccoli/Broccolini
2. Cabbage, Red
3. Cabbage, Green
4. Cauliflower
5. Lettuce, Iceberg
6. Lettuce, Red Leaf/Green Leaf
7. Lettuce, Romaine
8. Herbs
9. Pineapple
10. Ginger
11. Cantaloupe
12. Small Citrus Sizes across all Varieties

**Weather**









**SALINAS, CA**

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
64°   42°F	74°   50°F	85°   52°F	80°   50°F	69°   49°F	70°   52°F	71°   48°F	64°   46°F
							
Partly Cloudy	Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Sunny	AM Showers	AM Clouds/PM Sun









**YUMA, AZ**

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
87°   63°F	88°   65°F	92°   63°F	96°   68°F	95°   68°F	97°   68°F	95°   66°F	89°   60°F
 Partly Cloudy	 Partly Cloudy/Wind	 Sunny	 Mostly Sunny	 Mostly Cloudy	 Mostly Sunny	 Sunny	 Mostly Sunny









**OXNARD, CA**

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
67°   52°F	81°   60°F	84°   56°F	74°   56°F	68°   55°F	68°   56°F	67°   56°F	66°   52°F
 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Mostly Sunny	 Cloudy	 Sunny	 Mostly Sunny	 Partly Cloudy









**CULIACAN, SINALOA**

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
95°   64°F	95°   65°F	96°   68°F	98°   67°F	98°   66°F	98°   66°F	96°   65°F	96°   66°F
 Mostly Sunny	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Mostly Sunny	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy









**HERMOSILLO, SONORA**

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
93°   61°F	94°   65°F	97°   67°F	100°   66°F	99°   68°F	98°   66°F	97°   65°F	95°   63°F
 Partly Cloudy	 Mostly Sunny	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Mostly Sunny	 Mostly Sunny









**JALISCO, NAYARIT**

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
83°   56°F	84°   56°F	84°   58°F	84°   59°F	84°   59°F	84°   58°F	85°   58°F	86°   59°F
 Sunny	 Sunny	 Sunny	 Mostly Sunny	 Sunny	 Mostly Sunny	 Mostly Sunny	 Mostly Sunny









**VIZCAINO, BAJA SUR**

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
96°   64°F	95°   65°F	95°   66°F	96°   66°F	96°   66°F	96°   64°F	96°   65°F	97°   66°F
 Sunny	 Mostly Sunny	 Mostly Sunny	 Partly Cloudy	 Sunny	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy

**PLANT CITY, FL**

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
86°   67°F	88°   65°F	88°   65°F	88°   66°F	86°   64°F	71°   61°F	76°   62°F	78°   63°F
 PM	 Partly Cloudy	 Partly Cloudy	 PM	 PM	 Rain	 Showers	 Partly Cloudy
Thunderstorms			Thunderstorms	Thunderstorms			

## IMMOKALEE, FL

Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9
85°   68°F	89°   66°F	89°   66°F	88°   65°F	87°   66°F	79°   64°F	79°   64°F	80°   64°F
 PM	 Partly Cloudy	 Partly Cloudy	 PM	 PM	 Thunderstorms	 Scattered Thunderstorms	 PM Showers
Thunderstorms			Thunderstorms	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 94.3-million-pound harvest for week 13, with 76.7 million pounds shipped to the U.S. Mexican fruit continues to peak toward the 40-48 count with high dry matter of 34%. 60ct avocados have tightened up due to increased retail promotions. Current USDA pricing on 60ct is higher than 48ct. California reported a 7.5 harvest with sizing peaking on the smaller fruit.

**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 will remain tight for at least the month of April. 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 as well as reds are starting to get tighter this week and seem to be declining in availability; as the crop ages, we will start to see a bit more ambering in the greens as well as more dehydration in stems and shatter. Pricing will continue to climb over the coming weeks, we will not see relief until new crop out of Mexico starts over the next few weeks.

## Berries

**Strawberries: ESCALATED** Supplies have increased significantly. Santa Maria is beginning to see relief following several weeks of extreme heat, with cooler temperatures and a returning marine layer helping to stabilize fruit and improve handling characteristics. However, quality remains under pressure, with elevated cull rates, softer fruit, and widespread sunburn still impacting packouts. Production has

softened due to quality constraints and uneven ripening, with many plants holding green fruit that is not coloring properly. While the underlying fruit load remains strong, the region is in a high-stress transition period, and the next 7 to 10 days will be critical in determining recovery and production rebound. In Watsonville and Salinas, cooler conditions have supported quality improvements, with most sunburn issues resolving and overall fruit condition stabilizing. Some regional challenges remain, including mildew in Salinas and localized decay in Watsonville, but crews are actively managing these issues. Production has exceeded early week expectations and is projected to increase further next week, potentially doubling if rain forecast does not materialize. Overall availability in the region remains strong.

**Blackberries:** Weather conditions across Mexico remain hot, though temperatures today are slightly lower than earlier in the week. Most growing regions are experiencing persistent heat, which is beginning to affect fruit conditions, particularly in blackberries. Despite the high temperatures, operations remain on schedule, and growers continue to move product through the system as forecasted. Blackberry quality has been affected by the ongoing heat. Approximately 80–88% of the volume is currently grading as Fancy, while Premium fruit has dropped due to elevated temperatures and associated pressure on size and firmness. Even so, overall quality remains good, with roughly half of the fruit still meeting Premium or Fancy grade standards, depending on the ranch. Regression is present in limited amounts, but most defects remain manageable. Growers continue to maintain acceptable pack quality despite heat-related challenges. We should be entering peak volume here in the region over the next two months. We are in a gap of organic blackberry availability, but we should start to see volume slowly trickle in over the next week or two.

**Raspberries: EXTREME** Supply and availability will remain limited throughout most of April. Weather conditions across Mexico remain hot, though temperatures have moderated slightly compared to earlier in the week. Prolonged heat is beginning to impact fruit condition, particularly in blackberries, while overall operations continue to run on schedule and volumes are moving as forecasted. Raspberries are performing well under current conditions, with strong color, firmness, and flavor, and most lots grading into Premium and Fancy categories. The crop has shown greater heat resilience than blackberries, with stable quality and no major operational concerns. Peak raspberry volumes are expected toward the end of April and will continue through May.

**Blueberries: EXTREME** Overall supplies remain limited but should increase toward mid-April. Production across key growing regions is transitioning, with Mexico ramping toward peak volumes while domestic regions begin to come online. Near-term supply will remain somewhat uneven as certain regions experience brief volume dips and others delay harvest timing due to recent weather volatility. Quality remains generally strong, though localized heat impacts and pack-out challenges are creating some variability, particularly in organic programs. As we move through April, overall availability is expected to improve, supported by peak production out of Mexico and the ramp-up of domestic supply. Looking ahead, expect strengthening volumes and improved consistency into May as multiple regions align in peak production.

### **Citrus**

**Limes: EXTREME** Rain has continued to cause harvest delays and has been impacting size in Mexico and other regions across Central America causing the size curve on limes being exported to skew heavy to 230 ct and 250s. Unfortunately, this is leaving larger sizes such as 200's, 175's and 150's extremely tight. We are also seeing moderate pressure on quality with imperfections present, such as oleocellosis. The

market is expected to remain very tight through April from all regions, and upward price pressure is expected to persist through mid-May.

**Lemons:** Some suppliers report fruit is leaning more towards a fancy grade and peaking on 115's. 140/165/200's are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve. Domestic Meyer lemons are available.

**Navels:** 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 of great quality overall, just LARGE!

**Valencia's:** Some suppliers have limited TX Vals as an option. California Valencia's are set to begin mid to 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:** 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:** 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 is no longer escalated, but Hearts still are.

**Romaine VA:** Quality and supplies are good. We saw 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 weather and virus pressure impacting the final blocks of production. This combined with Florida seeing 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 week. Quality remains good.

**Mixed Chili Pepper: ESCALATED** Supplies are very tight out of Sinaloa and Sonora. Markets will be shorter this week on several varieties: Jalapeno, Serrano, Anaheim, Caribe, Habanero, Fresnos, Poblanos, and Shishito Pepper.

**Tomatillo: ESCALATED** We expect to see very light supply out of Mexico for the next several weeks. 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 remain short through mid-April. Due to light supply out of Mexico and only salvage crop available out of Florida. We will not see improvements on supply until the summer crop starts in South Georgia around April 25<sup>th</sup>.

**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 the freeze earlier this year which will continue to impact the supply of fresh green beans, and "Act of God" declarations are still being enforced. Mexico is also experiencing lighter availability due to cooler weather slowing production. We expect markets to slowly improve mid-April as Florida starts new plantings.

**French Beans: ESCALATED** Production remains limited in Guatemala due to ongoing weather challenges, with supply expected to improve following Easter. Vessel delays are further impacting availability, creating additional short-term constraints. Mexican French bean supply is also limited, as cooler weather continues to affect yields.

**Zucchini/Yellow Squash:** Steady supply on green but light on yellow over the next week with newer blocks coming on in Florida as well as Mexico. Quality is good on both colors.

**Herbs: WATCHLIST** Basil production and quality remain impacted by cold weather in Mexico, heavy rainfall in Colombia, and heavy rain in Hawaii. Imported chervil supply has improved out of Ecuador, while tarragon remains 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:** Sizing is starting to peak towards 9s followed by 12s. Quality continues to be good. Brix levels mostly range from 12-14%.

**Honeydew: ESCALATED** Production has increased, but overall supply was almost empty. Suppliers are covering contracts and hoping to see more improvements in volume later next week. Flexibility in sizing is still important.

**Watermelon:** Import melons are finishing up, causing pricing to increase while we wait for USA and Mexican product to start in the next couple of weeks.

## **Mixed Vegetables**

**Artichokes: ESCALATED** Quality is okay, but supplies are extremely limited. Heavy mildew pressure is keeping all sizing limited. Expect limited supplies for the next 2 to 3 weeks.

**Asparagus: ESCALATED** Mexican production in the San Luis and Caborca regions has begun to slow due to elevated field temperatures and declining yields. Peruvian production is expected to begin this weekend, with volumes anticipated to increase following Easter. Markets remain extremely active, driven by reduced Mexican supply, limited early Peruvian production, and higher fuel costs.

**Bok Choy: ESCALATED** Quality and supplies are okay, but the heat is affecting quality and therefore limiting supplies.

**Broccoli Florets/Broccoli Crowns: ESCALATED** 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:** Quality is good. Supplies have improved but remain light with some growers. Growers are still holding to averages. The heat could affect quality and supplies as we transition into Yuma.

**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** Supplies remain tight on Baby Carrots, Cellos, and Jumbos. Rainbow Carrots remain steady with good quality and supply. 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:** Quality and supplies are good.

**Celery:** Quality and supplies are good.

**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 markets are steady.

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

**Green Onions:** Quality looks good and supplies have improved.

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

**Napa Cabbage: EXTREME** Quality is okay, but supplies are extremely limited. The hot weather is affecting growth and adding insect pressure.

**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 remain good; however, vessel delays may result in inconsistent availability. Mexican supply of snow peas and sugar snaps remains steady.

**Onions:**

Onions are currently transitioning from storage to new crop, and this is causing a slightly tighter market on white onions. The market should improve in 2-3 weeks with Texas and Mexico increasing volume. Yellow and red onion volume is stable.

**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, Roma Tomatoes and Snacking Tomatoes: ACT OF GOD** Florida will see its lightest production weeks of the season start now and are expected to see these conditions for at least the next 3-4 weeks. We will be in “Demand Exceeds Supply” conditions where we will expect to see heavy prorates and shorts during this time. We need to be flexible, having the ability to sub-sizes and varieties where possible to navigate the lack of supply from our Florida partners. Quality will be fair at best.

### **Mexico**

- **Round Tomatoes: EXTREME** Volume will be very short and will need to sub over to rounds where needed. This is all due to heavy disease pressure out of Sinaloa forcing that season to wind down prematurely and other regions are very slow to start or still weeks away from starting. We are seeing some very light picks start out of Baja so there may be some relief over the next 2-3 weeks. We will see color challenges, prorates and outright cuts over the next several weeks. Quality will be mixed; older fruit will have more imperfections while fruit from newer production will see far better quality.
- **Roma Tomatoes: EXTREME** There is a huge variance in quality and price this week; older production out of Sinaloa is riddled with Blight and compromised which will cause a dramatic drop off in volume, Fortunately we are seeing newer production out of Sonora ramp up and where quality is strong and will call for a premium; unfortunately there is not enough volume of out this region to cover the deficit left in Sinaloa and will be running short for the next several weeks. Markets are volatile and will change daily. We suggest being flexible on sizing and open to subbing rounds during this market condition.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: EXTREME** Demand exceeds supply due to virus pressure and crops ending early which will force pricing higher this week with possible GAPS in supply with very little being available. Quality is fair at best; we do not expect major improvements until we get into new crop around the end of April.

### **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:** Done until we start in California next month.

**Stone Fruit:** Light 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.