



## Weekly Market Review

### February 13, 2026

#### Overview

Tight market conditions continue across the vegetable category. Cool weather in Mexico and last week's freeze in Florida are impacting 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. Table grape supply remains steady, with red grapes readily available and green grapes tighter, while limes are slightly softer with larger sizes easier to source. Banana supplies are expected to tighten due to strong global demand and virus-related issues, creating potential spot market pressure. Arrivals of Cantaloupes and Honeydews from Guatemala have decreased, though demand is slowly improving with warming temperatures. Volume should increase toward the end of the month, and quality remains strong. Pineapple availability is slightly better but size flexibility is requested. Avocado harvests in Mexico remain robust, with medium and large sizes favored while small sizes tighten. Asparagus supplies are sharply limited, with only large sizes currently available due to Peruvian season closure and cool weather in Mexico. Strawberries, blueberries, and other berries are constrained by weather disruptions and seasonal transitions, keeping markets firm. Record-high temperatures in Yuma and adverse weather have created widespread mildew issues affecting Lettuce and Tender Leaf items, limiting harvestable acreage and shortening shelf life. Spinach, Arugula, and Spring Mix remain tight, with prorates likely. Carrots, Celery, and Green Onions continue to be constrained by storm damage and disease, with full recovery not expected until March. Broccoli and Cauliflower are at extreme trigger levels, with potential prorates up to 50%. Other crops including Brussels Sprouts, Cilantro, Anise/Fennel, Leeks, and Napa Cabbage are also limited. Growers anticipate intermittent supply gaps and early Yuma season completion, creating potential market instability. Smaller-size citrus is tighter across most varieties. California Navels are available but smaller sizes (113/138) are limited, while larger sizes remain plentiful. Organic Navels, Cara Cara, Blood Oranges, and Minneolas also favor larger sizes, with sizing up recommended. California and Texas Lemons, Pummelos, and Rio Red Grapefruit are available, though smaller or choice grades may be tight. Some Texas Valencia's are available, with a focus on larger sizes. Overall, careful sizing and flexibility are advised across all citrus varieties to accommodate availability constraints.

#### Market Alert List

- **Asparagus – EXTREME**
- **Bok Choy – ESCALATED**
- **Boston/Butter Lettuce – ESCALATED**
- **Blueberries – EXTREME**
- **Broccoli/Florets/Crowns – EXTREME**
- **Broccolini – ESCALATED**
- **Brussels Sprouts – EXTREME**

- *Brussels Sprouts VA – EXTREME*
- *Cauliflower – EXTREME*
- *Celery/Celery Sleeved – EXTREME*
- *Cilantro – ESCALATED*
- *Green Beans – EXTREME*
- *Fennel, Anise – ESCALATED*
- *Hot Pepper: Red Fresno, Habanero and Shishito – ESCALATED*
- *Leeks – ESCALATED*
- *Lettuce – EXTREME*
- *Lettuce Cello/Wrapped – EXTREME*
- *Limes – ESCALATED*
- *Napa – ESCALATED*
- *Green Onions – EXTREME*
- *Green Leaf – ESCALATED*
- *Parsley Italian – ESCALATED*
- *Romaine Hearts – EXTREME*
- *Spinach – EXTREME*
- *Snow Peas & Sugar Snap Peas – ESCALATED*
- *Strawberries – ESCALATED*
- *Sweet Corn – ESCALATED*
- *Tomatoes (Rounds, Romas and Snacking Tomatoes)*
  - *Mexico: ESCALATED 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. *French Beans*
5. *Lettuce, Red Leaf*
6. *Herbs*
7. *Small Lemons*
8. *Pineapple*
9. *Ginger*
10. *Melons – Cantaloupe and Honeydew*
11. *Raspberries*
12. *Small Citrus Sizes across all Varieties*

### 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 62.2-million-pound harvest for week 6, with 56.6 million pounds shipped to the U.S. Sizing continues to peak toward 48s and 60s count, while dry matter has climbed to 32%. There is still plenty of availability and the occasional sight of Lenticel due to rain throughout the season.

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

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

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

## **Berries**

**Strawberries: ESCALATED** Supplies are very limited across key growing regions as seasonal transitions and recent weather events continue to impact production. In California, Oxnard Spring crop production has been increasing under recent ideal weather conditions, with large sizing and very good quality reported. Santa Maria and Salinas/Watsonville Spring production has also begun, though volumes remain light. However, a significant rain event has moved in, and supplies have tightened quickly due to halted harvests. Forecasts indicate rainfall over the next 6-8 days, which could reset fields, reduce production, and delay anticipated volume increases. In Baja Mexico, both conventional and organic production are ramping up with strong quality and large sizing, though upcoming rain may slow progress, even if impacts are expected to be less severe than in California. Central Mexico production continues to decline as the season moves into its late stages, with overall quality remaining good despite some bruising reports. In Florida, multiple freeze events over the past several weeks have significantly reduced harvest volumes. Field challenges include water damage from prolonged frost protection, freeze damage, uneven ripening, and some internal discoloration. While fresh pack volumes remain limited, pack quality has generally been very good, with fruit sizing still trending medium to large.

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

**Raspberries: WATCHLIST** Production remains active in Central Mexico and Baja, though supplies have tightened as crops move past seasonal peak volumes, resulting in reduced availability. Overall quality remains good; however, some instances of soft or overripe fruit are being reported due to recent heat, rainfall, and elevated humidity in the growing regions.

**Blueberries: EXTREME** Demand continues to exceed supply as production remains active in Central Mexico, but volumes are tightening as crops move past seasonal peak levels. Mexican quality and sizing remain strong; however, overall availability is expected to stay limited over the next several weeks as South American and Mexican volumes decline and early Florida production may not be a meaningful factor in March. Early reports of freeze-related crop losses in Florida could have significant implications for the early spring blueberry crop.

## **Citrus**

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

**Small Citrus: WATCHLIST** Small fruit is very tight across the board. Expect to be subbed for larger sizes.

## West Coast Lettuce

**Iceberg: EXTREME** 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 the market to continue to rise due to yields being low because of mildew damage and cap leaves. Quality will be hit or miss. Shortened shelf-life issues should be expected. Iceberg remains at the Extreme Trigger. **Iceberg VA: ESCALATED** Quality and supplies are just okay. We have seen reports of short shelf life 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 beginning to hold to averages. Hearts are now at the **EXTREME** trigger. The market is trending upward, and 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. Green Leaf is now escalated. We are watching all lettuce items closely as the market is trending upward.

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**Green Bell Pepper: EXTREME** Better supply out of Mexico this week and quality is very good 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 March.

**Color Bell Pepper:** Lighter volume due to cooler weather. Overall quality will remain good out of McAllen and Nogales.

**Mini Sweet Pepper:** Supply was lighter this week due to the cooler and wet weather in Culiacan. Quality remains good.

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

**Tomatillo: ESCALATED** Supply turned and got very short due to heavy rains this past week. Market volatility is expected through the next 2-3 weeks. We do expect to see very short supply on peeled tomatillo in particular during this market.

**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 improved this week as they break open new production. Quality is outstanding. Honduras will start shipping over the 7 to 14 days.

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

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

**Green Beans EXTREME:** Supply will be extremely short out of Florida due to last week's freeze and expect to see volatility over the next several weeks as growers assess the heavy losses. Markets jumped several dollars, and quality is fair on what is available. Mexico is also seeing lighter availability due to cooler weather slowing down production. High demand has also put upward pressure on FOB pricing out of Nogales and McAllen.

**French Beans: WATCHLIST** While production in Guatemala remains stable, vessel delays into East Coast ports are creating inconsistent availability. In Mexico, French bean supplies are fair overall, though cooler temperatures are continuing to impact yields.

**Zucchini/Yellow Squash: EXTREME** Supply very short in Florida due to last week'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 and rosemary production and quality from Colombia continue to be impacted by heavy rainfall, along with ongoing USDA holds and fumigation delays. Imported chervil supplies remain limited from Ecuador. Out of Mexico, basil supply and quality have been inconsistent due to cooler weather, with occasional tip burn present during the winter months. Arugula and Cilantro are extremely limited from some growers and prorates should be expected.

#### **Melons WATCHLIST**

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

**Honeydew:** Honeydew production on 8ct remains limited, as mostly 5's and 6's makes up over 95% of production. The change in the growing regions will see less honeydew arrival over the next two weeks. Flexibility on sizing will be required during this period. Quality has been good and improving with Brix levels at 12-13%.

**Watermelon:** The market on seedless melons have increased with less Mexican production. 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. Large sizes are still limited but supplies are improving.

**Asparagus: EXTREME** Mexican production remains limited due to continued cooler weather in the San Luis and Caborca regions, while the Peruvian season is rapidly winding down and will not resume until late March or April. With reduced output from both origins, markets have become very active, and supplies are expected to remain extremely tight over the next two to three weeks. Current availability is especially constrained on larger sizes, and loading may be challenging in the near term. Growers will work to cover as much demand as possible; however, size substitutions and prorates will likely be necessary until Mexican production rebounds and weather conditions improve.

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

**Broccoli Florets/Broccoli Crowns: EXTREME** 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, pin rot continue. Growers are holding to strict averages when they can, but we are seeing prorates as severe as 50%.

**Broccolini and Sweet Baby Broccoli: ESCALATED** 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 prorates should be expected. The market is escalated due to limited supplies.

**Brussels Sprouts: EXTREME** Supplies are still limited but are improving. We are still combating insect pressure and internal browning. The market remains at the extreme trigger, but we should start to see some relief in the next 2 weeks. Growers are holding to averages for a bit longer.

**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 (Approx. 2-3 weeks). There are Jumbos available in GA if you could load there. Growers request orders be sent in as early as possible.

**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, prorates should be expected on VA and Carton Celery is still being held to strict averages. We will not see full relief until April.

**Corn, Sweet: EXTREME** We will continue to see a split market on corn this week due to cold weather in Florida where prices are extremely high. Florida is currently evaluating losses; some growers have declared a complete loss for the remaining winter cycle. Higher demand is forcing FOB prices higher out of Mexico where supply has been somewhat stable and expect to see volatile markets through April.

**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 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 though mid-February. 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 until we get into March.

**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: EXTREME** 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** Adverse weather has significantly impacted both major growing regions, with heavy rainfall in Northern Mexico and freezing temperatures in Guatemala sharply reducing production. As a result, supplies are expected to remain limited over the next 7-14 days, with relief anticipated once the Baja season ramps up and begins contributing additional volume.

## **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.**

### **East Coast**

- ***Round and Roma Tomatoes: EXTREME*** Markets are expected to be volatile through early May and hit and 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.
- ***Snacking Tomatoes: Grape Medley, Grape Tomato, Cherry Tomato: EXTREME*** Supply was very short this week, and pricing was higher. It did seem to feel there were a few more grapes on the market this week. All other varieties: Medley and cherry remain very short.

### **Mexico**

- ***Round Tomatoes: ESCALATED*** Volume is slowly improving, and demand from the east is higher offsetting the increase in volume. We will see stronger markets with very high FOB prices established. Quality remains very good through McAllen, and Nogales.
- ***Roma Tomatoes: ESCALATED*** Volume is slowly improving, and demand from the east is higher offsetting the increase in volume. We will see stronger markets with very high FOB prices established. Quality remains very good through McAllen, and Nogales.
- ***Snacking Tomatoes:***
  - ***Grape Tomatoes, Grape Medley and Cherry Tomatoes: ESCALATED*** Lighter supply and higher demand from the east have pushed prices up a tad and expecting that trend to continue this week with the cold weather in Florida. Quality is outstanding.

## **Other Fruit:**

**Apples:** The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has

also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

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

**Pomegranate:** Limited Supply out of Israel.

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

**Cherries:** Lighter supply available out of Argentina and Chile.

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

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

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

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

**Quince:** Limited supply available this week.