



Weekly Market Review March 27, 2026

Overview

Tomatoes will start to hit critical supply levels this week. We 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 very hot weather. 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 and Napa have extremely limited supplies. Napa is now escalated to 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. 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 steady, and Honeydew production has improved slightly. Pineapple availability has slightly improved, with a request for size flexibility. Avocado demand has increased due to heavy retailer promotions. Overall, supply remains strong with California ramping up. Recent high temperatures and warm nights in California have created sustained heat stress, disrupting normal Strawberry plant function, leading to uneven ripening across fields. Prolonged heat is also impacting quality, causing softer fruit, reduced shelf life, and inconsistent coloration. While harvests continue, increased variability in both production and quality is expected as the crop works through these conditions. Blueberry and Raspberry volumes remain very low, with continued prorates. Blueberries are expected to see relief towards the end of April as we get into the Georgia season. 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.

Market Alert List

- Asparagus – ESCALATED
- Artichokes – ESCALATED
- Bok Choy – ESCALATED
- Blueberries – EXTREME
- 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
- 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. 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

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 78.1-million-pound harvest for week 12, with 64.5 million pounds shipped to the U.S. Mexican fruit continues to peak toward the 40-60 count with high dry matter of 34% California reported a 4.7 harvest with sizing peaking on the smaller fruit. Heavy retail promotion has prices slowly increasing. Holy Week is approaching fast, and we will see a reduction in harvesting.

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 Supplies continue to decline due to the ongoing heatwave in California, resulting in quality challenges. In Santa Maria, several days of extreme heat have stressed plants, increasing the risk of sunburn, softer fruit, and reduced shelf life, while uneven ripening is creating short-term production volatility and lighter harvests. Although Watsonville and Salinas have experienced slightly milder conditions, rising sunburn and field clean-up efforts are also reducing volumes, despite generally stable quality. Production is expected to improve over the next four to five weeks as temperatures are moderate and fields normalize. Central Mexico and Florida have largely concluded for the season, limiting additional supply support in the near term.

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. Prorates 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 2-4 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 Overall supplies remain slightly limited despite a bump in Mexican production. Mexico saw a notable increase in production this past week and is expected to maintain this range over the next 1-2 weeks before reaching peak production toward the end of April. Quality remains strong, with fruit still green and progressing through normal ripening; however, a short-term dip in volume is anticipated before entering the next peak window, primarily driven by the Baja region, with solid fruit expected from weeks 16-18. No significant issues have been reported, and the overall outlook remains favorable. Florida and Georgia production is progressing as expected, though timing has been slightly too delayed to allow for proper ripening, and estimates remain unchanged. Georgia growers remain optimistic as fruit continues to size, with initial volumes expected within the next 1-2 weeks, assuming favorable weather conditions persist. Oxnard continues to play a key role in organic supply during the South American transition, packing limited daily volumes of pints and 18 oz items for committed customers. Pack-out efficiency averaged approximately 60% last week, caused by recent high temperatures, with increased instances of red back and slightly lower overall yields. To support more consistent ripening and stabilize production, harvest intervals have been adjusted to a 10- to 11-day cycle. While fruit quality remains generally strong, near-term plant stress from recent heat is expected, though moderating temperatures should support improvements in both quality and production as we move into the weekend. Chile is effectively at the end of its season.

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 being heavy to the smaller fruit; we do anticipate this to improve over the next 3-4 weeks. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability expected through April 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 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.

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 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 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.

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 can be reached.

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 should begin to improve after Holy Week. 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 Markets remain elevated, driven by reduced green bean supply, strong holiday demand, and very limited supply. Guatemalan supply remains extremely limited due to prior cold weather, frost, and ongoing rainfall. Mexican French bean availability is also constrained as cooler temperatures continue to impact 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 ongoing USDA holds and fumigation requirements. Imported chervil supply has improved out of Ecuador, while tarragon remains limited.

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 Production has increased as the Downy Mildew virus has improved. Some suppliers were able to get into different fields early, which has helped the market. Flexibility on 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 is declining seasonally, with high temperatures further reducing yields and increasing seeding. Peruvian production is expected to begin within the next 2-3 weeks. Markets have strengthened due to Easter demand, reduced volumes, and higher fuel costs.

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: 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 up 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 supplies remain strong, while sugar snap availability has declined. Mexican snow pea and sugar snap supplies are showing improvement as production conditions stabilize.

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, 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 experience pro rates and shorts during this time and will need 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 decline over the next week due to heavy disease pressure out of Sinaloa and will see very limited supply out of Sonora. We will see color challenges, pro rates and outright cuts over the next several weeks. We anticipate improvement sometime near the third week of April. 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 out of 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**- Supply will be very light due to virus pressure and crops ending early which will force pricing higher this week with little availability. 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: 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.