



Weekly Market Review April 17, 2026

Overview

We will continue to see “demand exceeds supply” conditions on Tomatoes this week, with Florida entering its tightest week of the freeze event. Expect deep prorates and broader quality issues. We do not anticipate improvement for another 2-3 weeks and highly recommend flexibility with sizing and varieties, as well as scaling back portions or removing items from menus where possible. Limited availability will also persist for Color Bells, Green Bells, and Corn. Hot Peppers remain in very tight supply across all categories. The Lime market is extremely short and is expected to remain tight for the next 2-3 weeks. Most of the growers are now in Salinas, as the Yuma season has come to an end. Rain and cooler weather are still in the forecast, which has slowed growth patterns. Harvesting is being affected by the rain. These factors will limit supplies. Broccoli, Cauliflower, Lettuce have very limited supplies and are the extreme trigger. Prorates should be expected. Romaine/Romaine Hearts, and Celery remain escalated due to limited supply and quality concerns. Carrots continue to face ongoing supply challenges, with full recovery not expected until May. Artichokes, Bok Choy, and Napa remain extremely limited and escalated. Growers anticipate that the weather conditions combined with the transition will create quality and supply issues along with loading delays. Growing regions continue to experience cool mornings and nights with warm daytime temperatures, while ongoing port congestion in Guatemala and Honduras is causing continued delays. As a result, items including Baby Carrots, Baby Zucchini, French Beans, Peas, Broccoli Florets, and Radicchio remain 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 is expected to decrease due to reduced volume out of Veracruz, Mexico, leading to higher markets and decreased 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 pressures. Cantaloupe volume is still limited due to heavy retail promotions. Honeydew saw an increase of product from Mexico but demand still excess supply. Pineapple availability has tightened up, with a request for size flexibility. Avocados from Mexico had a solid harvest after the holy week shut down. The pipeline should be back to normal. Strawberry supplies remain steady for now, though upcoming rainfall may create short-term production dips and continued quality variability as regions move through post-peak conditions. Blackberry volumes are building toward peak, but heat continues to pressure quality, while raspberries remain extremely tight despite strong quality and are expected to improve toward the end of April. Blueberry supply is increasing but remains uneven as regions transition, with availability expected to strengthen 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 Valencia’s are expected in mid-to-late April. Mandarin availability is mixed, and Grapefruit supplies are available. Please begin considering imports for this summer. They will offer relief on strained sizing- especially for people on the east coast. Freight: Limited trucks and record high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including sea freight companies, invoking fuel surcharges which will impact cost inputs.

Market Alert List

- *Asparagus – EXTREME*
- *Artichokes – ESCALATED*
- *Bok Choy – EXTREME*
- *Blueberries – ESCALATED*
- *Broccoli – EXTREME*
- *Broccoli Crowns Asian Cut – EXTREME*
- *Carrots – EXTREME*
- *Cauliflower – EXTREME*
- *Celery – ESCALATED*
- *Fennel, Anise – ESCALATED*
- *French Beans – ESCALATED*
- *Honeydews – ESCALATED*
- *Hot Pepper: All Varieties – ESCALATED*
- *Lettuce – EXTREME*
- *Limes – EXTREME*
- *Napa – EXTREME*
- *Parsley Italian – ESCALATED*
- *Raspberries – EXTREME*
- *Romaine – ESCALATED*
- *Romaine Hearts – ESCALATED*
- *Sweet Corn – EXTREME*
- *Tomatoes (Rounds and Roma Tomatoes)*
 - *Mexico and Florida – EXTREME*
- *Warm Veg Category Corn, Bell Pepper, Eggplant –EXTREME*
- *White Asparagus – ESCALATED*

Watch List

1. *Broccolini*
2. *Cabbage, Red*
3. *Cabbage, Green*
4. *Lettuce, Red Leaf/Green Leaf*
5. *Herbs*
6. *Pineapple*
7. *Ginger*
8. *Cantaloupe*
9. *Small Citrus Sizes across all Varieties*
10. *Sugar Snap and Snow Peas*
11. *Tabel Grapes*

Fruits & Vegetables

Tariff Update: President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected.

Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached. Avocados: Mexico had an 87.4-million-pound harvest for week 15, with 60.9 million pounds shipped to the U.S. Mexican fruit continues to peak toward the 40-48 count with high dry matter of 35%. 60ct avocados have tightened up due to increased retail promotions. Current USDA pricing on 60ct is higher than 48ct. California reported a 13.2-million-pound harvest with 26% dry matter.

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: WATCHLIST Quality is outstanding on the red and black varieties with good sizing and brix are hitting the high teens. We are seeing availability get tighter by the day as the offshore season starts to close. 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. Mexico will start scratching this week and expect volume by the first or second week of May crossing through McAllen and Nogales. 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: Despite recent rainfall, volumes have remained steady this week. However, additional rain forecast from Friday through Monday may create a dip in production heading into next week. Santa Maria has transitioned into more typical seasonal conditions, with cooler temperatures supporting improved fruit firmness following prior heat stress. Quality remains stable overall, though smaller sizing and minor defects such as green tips and isolated rot are present as the region moves into a post-peak production phase. Volumes are trending slightly downward and are expected to remain flat in the near term, with potential short-term disruption from upcoming rain. In Watsonville and Salinas, recent warm weather has given way to cooler conditions, with significant rainfall expected that could impact both quality and harvest schedules. While quality has improved, decay pressure remains, and excessive rain could create additional short-term challenges. Production is expected to increase, but actual volumes will depend heavily on the extent of rainfall, with the potential for temporary declines before fields recover and return to normal harvest patterns.

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 Weather conditions across Mexico remain hot, though temperatures have moderated slightly from earlier in the week. Prolonged heat is beginning to impact fruit condition, particularly in blackberries, while operations continue to run on schedule and volumes are moving as forecasted. Raspberries continue to perform 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: ESCALATED Production is building across key regions, with one primary origin exceeding expectations and approaching peak volumes, while domestic regions begin a delayed but steady ramp-up. Near-term supply will remain uneven due to weather-related disruptions, labor variability, and temporary harvest pauses in certain areas. Quality remains generally strong, though availability will fluctuate as regions transition and align. Over the coming weeks, expect increasing volumes and improved consistency as peak production is reached, with more meaningful supply relief heading into May.

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 in all regions, and upward price pressure is expected to persist through mid-May. Subbing to smaller sizes will be necessary through May to keep the supply chain stable over the next several weeks.

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.

Valencia's: 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: ESCALATED Lettuce quality is fair and supplies are very limited. 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. Growers are holding to averages when they can, but there is potential for prorates. **Iceberg VA: ESCALATED** Quality is fair and supplies are light. We have seen reports of short shelf life, insect pressure and mildew in bags. Growers are holding to averages, and there is potential for prorates.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine Heart quality is good, but supplies are tightening up. There have been reports of bruising, fringe burn, light weights and mildew on the outer leaves. Growers are holding to averages.

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 when we transition to Coachella while in the east South Georgia is expected to start scratching May 11th.

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.

Jicama: New crop available. Quality is excellent.

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. We are starting to see some light numbers out of Coachella this week but nowhere near the volume needed to impact markets. The East coast should ramp up late May. Markets will be shorter this week on several varieties: Jalapeno, Serrano, Anaheim, Caribe, Habanero, Fresnos, Poblanos, and Shishito Pepper.

Tomatillo: Better Supply available this week and quality is good.

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: Supply crossing through Nogales and McAllen is improving as growers break new blocks out of Mexico. We expect to see downward pressure on pricing for the remainder of the month. In the east supply is also improving as new crop out of Florida and Georgia begin to ramp up.

English Cucumbers: Excellent supply out of Canada, Nogales and McAllen. Quality is good.

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

Green Beans: Florida has transitioned to new crop and supply has improved as well as quality. Mexico is still harvesting and expect to until California ramps up. Quality is mixed- Florida is excellent (new crop), Mexico is hit and miss as the season winds down.

French Beans: ESCALATED Production in Guatemala remains limited due to ongoing weather challenges, though supply has begun to improve following Easter demand. Mexican conventional French bean availability remains tight as cooler weather continues to impact yields. Overall supply is expected to improve as we move into May.

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. Georgia and California expected to start in 2 to 3 weeks.

Herbs: WATCHLIST Basil supply and quality continue to be hit or miss due to hot weather. Expect improved supply in two to three weeks. Steady supply, fair quality on all other herbs.

Melons WATCHLIST

Cantaloupe: Due to heavy retail pulls on 9s and the already limited 12s and 15ct, the market is now leaning toward 6s and jumbo 9s. All sizes are expected to be in short supply for the next 2-3 weeks. Quality continues to be good. Brix levels mostly range from 12-14%.

Honeydew: ESCALATED Unexpected lower yields have pushed the market into an extreme situation. Demand excess supply and customers will need to be flexible with sizing. An increase of product from Mexico has helped but is still not enough to keep up with demand. Suppliers are covering contracts the best they can and hoping to see more improvements in volume in a few weeks.

Watermelon: The market has seen an increase of Mexican product crossing, creating opportunities for buyers. Florida is still weeks away from having anything to offer.

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: EXTREME Mexican production out of Caborca has concluded for the season, while Baja has begun with very limited volumes. Peruvian production is increasing; however, it remains insufficient to meet demand across both coasts. Larger sizes (large, XL, & Jumbo) are expected to be particularly limited next week, with prorates likely. Markets remain highly active, driven by reduced Mexican supply, limited Peruvian volume, and elevated fuel costs.

Bok Choy: EXTREME Quality is fair and supplies are limited

Broccoli Florets/Broccoli Crowns: EXTREME Quality is fair, but supplies are extremely limited. Reports of browning and pin rot continue. The market continues to rise.

Broccolini and Sweet Baby Broccoli: Quality is good. Supplies remain light with some growers. Growers are still holding to averages.

Brussels Sprouts: Supplies and quality are good. We are still combating insect pressure and internal browning but overall, quality is good.

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 to be sent in as early as possible. At least 7-10 days ahead of time.

Cauliflower: EXTREME Quality is good, but supplies are still light with some growers. The market continues to rise.

Celery: ESCALATED Quality is just okay and supplies are tightening up. This is causing the market to rise.

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: 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.

Green Onions: Quality looks good and supplies are okay, but some growers are still holding to averages.

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 are good, but some growers have light supplies from the effects of the heat wave

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 and quality look good. Reports of weak texture, discoloration, and wilting continue.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: WATCHLIST Guatemalan snow pea and sugar snap supplies have declined slightly, while Mexican snow pea availability remains steady. Sugar snap supplies are expected to tighten further heading into next week.

Onions:

Onions are currently transitioning from storage to new crops, 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 and most critical week in production with very little volume to harvest. We expect this to change over the next 2-3 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-size 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 the shortest this week and will need to be flexible on sizes and potentially sub to Romas 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.