



Weekly Market Review May 8, 2026

Overview

Markets will begin to ease back as more Tomato production comes online out of Florida and Mexico. We should start to see more availability this week; Romas will be plentiful while Rounds and Cherry Tomatoes will remain on the lighter side; substitutions can begin to ease back this week for some shipper based on where they were growing and how their transition crops fared through the spring. Hot Peppers remain in very tight supply across all categories. The Lime market will start to ease back as more volume crossed the border with peak sizing on small fruit. 175's and larger will be short with substitutions to smaller sizes necessary for the next several weeks. Unfortunately, the market remains very volatile right now. We are experiencing high markets and shortages on multiple items. Rain and cooler weather are still in the forecast, which has slowed growth patterns. Harvesting is being affected by the rain. The cooler weather and the rain will limit supplies. Demand exceeds supply for many commodities. Broccoli, Broccolini, Celery, Cauliflower, Romaine, Red Leaf, Green Leaf, Boston/Bibb and Iceberg Lettuce have extremely limited supplies and are the extreme trigger. Prorates should be expected on those items. Carrots continue to face ongoing supply challenges, with full recovery not expected until the end of May. Artichokes, Fennel and Napa remain extremely limited and escalated. Growers anticipate that the weather conditions will create quality and supply issues for the next several weeks as well as loading delays. Cantaloupes are still seeing good production as offshore suppliers finish up the season. Honeydew production has increased with more product coming from Mexico and market pricing has eased. Pineapple availability has tightened up, and we recommend having size flexibility. Mexico lost a day of harvesting Avocados last week due to a holiday and with a heavy holiday pull standing inventories in the US are down. Berry supplies are mixed, with Strawberries gradually improving following recent weather disruptions, though volumes remain moderate and sizing is still impacted. Blackberry supply is steady and at peak levels, but quality continues to face pressure from sustained heat, while domestic production remains several weeks away. Raspberry supply remains stable with strong quality, showing resilience to heat, with peak volumes expected to build into mid-May. Blueberry availability is currently strong, supported by peak production out of Mexico and improving Southeast volumes, though some regional variability persists due to weather impacts. Over the coming weeks, expect overall berry availability to improve and stabilize as domestic regions ramp up, with more consistent supply and quality heading into late May. Citrus markets are experiencing tight supplies on smaller sizes across many varieties, including Lemons, Navels, Cara-Caras, and Blood Oranges, with fruit generally trending large. Domestic Meyer Lemons are available, and California Valencia's are expected in late April/early May. 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*
- *Bok Choy – ESCALATED*
- *Boston/Butter Lettuce – EXTREME*
- *Broccoli – EXTREME*
- *Broccoli Crowns Asian Cut – EXTREME*
- *Broccolini – ESCALATED*
- *Carrots – EXTREME*
- *Cauliflower – EXTREME*
- *Celery – EXTREME*
- *Fennel, Anise – EXTREME*
- *French Beans – ESCALATED*
- *Green Leaf/Red Leaf Lettuce – EXTREME*
- *Green Onions – ESCALATED*
- *Honeydews – ESCALATED*
- *Hot Pepper: All Varieties – ESCALATED*
- *Lettuce – EXTREME*
- *Limes – ESCALATED*
- *Napa – EXTREME*
- *Parsley Italian – ESCALATED*
- *Romaine – EXTREME*
- *Romaine Hearts – EXTREME*
- *Spinach – ESCALATED*
- *Table Grapes – ESCALATED*
- *Tomatoes (Rounds and Roma Tomatoes)*
 - *Mexico and Florida – ESCALATED/ACT OF GOD*
- *White Asparagus – ESCALATED*

Watch List

1. *Blackberries*
2. *Cabbage, Red*
3. *Cabbage, Green*
4. *Herbs*
5. *Pineapple*
6. *Ginger*
7. *Cantaloupe*
8. *Raspberries*
9. *Small Citrus Sizes across all Varieties*
10. *Sugar Snap and Snow Peas*

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 58.6-million-pound harvest for week 18, with 50.5 million pounds shipped to the U.S. Mexican fruit continues to peak toward the 40-48 count with high dry matter of 35%. Production is starting to taper off as we are near the end of the season and with strong demand the market will start to firm up. We will start to have less growers as the growing area moved to higher elevation. California reported a 14-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 remains tight as Demand continues to be high. 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: ESCALATED Quality remains strong 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 sending significant volume next week with Coachella scratching by the second week of May.

Berries

Strawberries: Strawberry supplies are slowly increasing after rain events and cooler temperatures. Santa Maria conditions remain stable, with cooler temperatures supporting improved fruit firmness and overall quality. While quality is generally holding, crews continue to manage residual weather-related issues, and production has softened significantly as the region remains in a post-peak phase. Volumes are expected to remain relatively flat in the near term, with more meaningful improvement anticipated as warmer conditions return and support better ripening and sizing. In Watsonville and Salinas, favorable weather has supported improving quality, with effective field cleanup reducing prior concerns. However, recent weather impacts have led to smaller fruit sizing and reduced overall production, with volumes currently down significantly. Gradual week-over-week increases are expected, though production will remain moderate through May, with peak volumes now projected closer to early June.

Blackberries: WATCHLIST Volumes remain steady. Weather conditions across Mexico remain hot, though temperatures have moderated slightly from earlier in the week. Persistent heat is beginning to impact fruit condition, particularly in blackberries; however, operations remain on schedule, and volumes are moving as forecasted. Blackberry quality has come under pressure, with approximately 80–88% of the volume grading as Fancy, while Premium fruit has declined due to impacts on size and firmness. Despite this, overall quality remains acceptable, with defects largely manageable and pack integrity being maintained. The region is currently in peak production and is expected to remain so over the next two months. Conventional blackberry production in Watsonville remains a few weeks away from initial harvest, with the crop tracking slightly behind historical timing due to continued cooler weather patterns. Near-term volumes are expected to be very light, with harvest projected to begin around June 1 at limited pallet-level volumes. The organic program is also expected to be delayed by one to two weeks, shifting from late June into early July. While timing has been adjusted, total seasonal volume projections remain unchanged. The production curve will continue to be refined as the season approaches, with additional updates to follow as field visibility improves.

Raspberries: WATCHLIST Weather conditions across Mexico remain hot, though temperatures have moderated slightly from earlier in the week. Prolonged heat is beginning to impact fruit condition, 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 lots of grading into Premium and Fancy categories. The crop has shown greater heat resilience with stable quality and no major operational concerns. Peak raspberry volumes are expected toward mid-May.

Blueberries: Current supplies remain strong overall, supported by peak production out of Mexico and steady volumes from the Southeast. Mexico is in the final phase of peak production, with elevated volumes expected to hold over the next two weeks before beginning a gradual decline through May and into a reduced cadence in June. Supply from Florida and Georgia is improving, with strong production and quality out of Georgia helping to stabilize overall availability despite minor operational challenges and delayed organic starts. The Oxnard region is effectively finished, contributing minimal remaining volume as the season transitions out. In the Central Valley, production is beginning to ramp, though intermittent rain has created quality challenges and slowed harvest progression in some areas. While overall quality remains mixed, improvements are being seen across certain growers, and volume is expected to build steadily in the coming weeks. Conventional supply will remain limited in the near term, with more meaningful increases anticipated heading into late

May. Overall, markets are expected to remain relatively stable in the short term, with strong supply supported by overlapping regions. Looking ahead, expect gradual tightening as Mexico declines, followed by improved consistency as domestic production ramps into peak by late May.

Citrus

Limes: ESCALATED Supply continues to improve but still experiencing issues with sizing on fruit out of Mexico and other regions across Central America; the size distribution will continue 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 will firm up this week as pull for Cinco De Mayo continues this week; however, the long-term outlook remains consistent with downward pressure on fob prices. Subbing to smaller sizes will be necessary through May to keep the supply chain stable over the next several weeks.

Lemons: 40/165/200'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 in a small way

Mandarins: Suppliers are a bit of a mixed bag on Mandarins. Some suppliers have limited availability while others have plenty.

Cara-Cara's and Bloods: Still peaking large. Tight on the smaller sizes.

Grapefruit: California Grapefruit available!

West Coast Lettuce

Iceberg: EXTREME Lettuce quality is fair and supplies are extremely 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 prorates should be expected. We will likely not see full relief until the end of May.

Iceberg VA: EXTREME 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 when they can but prorates should be expected.

Romaine & Romaine Hearts: EXTREME Romaine and Romaine Hearts quality is fair, 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. Hearts remain at the extreme level.

Romaine VA: EXTREME Quality is okay, but supplies are light. We are seeing more core in the bags and some mildew.

Boston/Butter Lettuce: EXTREME Quality is good, but supplies are limited. Mildew and fringe burn pressure have been observed.

Green Leaf, Better Burger and Red Leaf: EXTREME Quality is good, but supplies are limited. Mildew and fringe burn pressure persist, and carton weights remain light.

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Green Bell Pepper: Steady supply out of South Florida this week as well as Coachella. Quality is good out of all regions. South Georgia will start with good volume in two weeks.

Color Bell Pepper: Good supply available on color pepper out of Florida and Mexico. The Hot House Pepper category steady out of Canada and Mexico. Coachella should start by Mid-May. Overall, quality is good.

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: Steady supply available out of South Florida, Nogales and Coachella. Quality is good.

Slicer Cucumbers: Supply crossing through Nogales and McAllen will tighten up as the season starts to close. In the east we are seeing good supply out of Florida and South Georgia. Quality is good from all shipping points.

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

Pickles: Lighter crossings available out of Central Florida and Nogales. 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 Supply of both organic and conventional French beans out of Guatemala remains limited. Mexican conventional French bean availability is also constrained, as cooler weather continues to impact yields. Overall supply is expected to improve by mid-May as growing conditions normalize.

Zucchini/Yellow Squash: Lighter supply on green but light on yellow this week putting upward pressure on price. Quality is good on both colors. Georgia and California expected to start over the next week.

Herbs: WATCHLIST Mint demand is expected to increase significantly as we move into May, driven by key holidays and events including the Kentucky Derby, Cinco de Mayo, and Mother's Day. Supply remains strong with excellent quality; however, we recommend placing orders early to ensure coverage during these high-demand periods. Basil and Thai basil have experienced elevated demand in recent weeks due to weather-related challenges in other growing regions. Despite this, the current supply is stable, and we are well-positioned to fulfill orders. With warmer weather in the forecast, availability is expected to remain steady moving forward

Melons WATCHLIST

Cantaloupe: Import production has increased as they make the final push to end the season. Domestic melons are still a week away. Quality remains good with brix levels from 12-14%.

Honeydew: ESCALATED The increase of Mexican product has settled the market with volume and complementary sizing. Quality on both the offshore and Mexican has been clean with good brix.

Watermelon: The market has seen an increase of Mexican product crossing, creating opportunities for buyers. Florida has started in a small capacity

Mixed Vegetables

Artichokes: Quality and supplies are good.

Asparagus: EXTREME Mexican production out of Baja remains limited, with Washington also continuing at low volume levels. Peruvian production is steady for now, though a seasonal decline is expected over the next two weeks as southern fields wind down. Michigan and Canadian production have been delayed due to frost and cooler temperatures, with volumes now expected to begin within the next 7–10 days, which should help supplement supply. Markets remain highly active amid ongoing supply constraints and regional transitions, with larger sizes continuing to be scarce.

Bok Choy: ESCALATED 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. Prorates and full cuts from some growers should be expected.

Brocolini and Sweet Baby Broccoli: ESCALATED Quality is good, but supplies are very limited. Growers are still holding to strict averages but prorates should be expected.

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 the next few weeks. Growers request orders be sent in as early as possible. At least 7-10 days ahead of time.

Cauliflower: EXTREME Quality is good, but supplies are extremely limited. The market continues to rise. Prorates should be expected.

Celery: EXTREME Quality is just okay and supplies are tightening up. Disease pressure and increased demand are contributing to the increased pricing. Growers are holding to averages. The high market is expected to last 3-4 weeks.

Corn, Sweet: Steady supply out of South Florida and Coachella. Quality is good. South Georgia will start production right around Memorial Day.

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: ESCALATED Quality looks good and supplies are okay. 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. Italian Parsley remains escalated.

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: ESCALATED 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 remain steady overall. Mexican snow pea availability continues to be stable, while sugar snap supplies remain limited.

Onions:

We are done with most storage crops out of Idaho/Oregon and what remains has questionable quality. California and New Mexico are our main sources of product. Market pricing remains 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.

East Coast

- **Round Tomatoes: ESCALATED/ ACT OF GOD** Volume will begin to improve over the next ten days as growers break new fields. We should see continued consistency of supply and much better quality over the coming weeks.
- **Roma Tomatoes: ESCALATED/ ACT OF GOD** Steady supply and good quality expected over the next ten days as grower break new fields in Central Florida. We expect to see normal supply in 7 to 10 days.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato:** Volume improving grape tomatoes while medley and cherries remain short.

Mexico

- **Round Tomatoes: ESCALATED/ACT OF GOD** Supply will remain firm on round tomatoes for another 10-14 days but should improve as newer blocks break on the baja and Southern Mexico. Quality is outstanding on what is crossing this week.
- **Roma Tomatoes: ESCALATED/ACT OF GOD** Improving supply and quality available out of Jalisco and Baja. We expect this trend to continue and get back to a stable market over the next 7-10 days.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato:** Grape Tomato supply will improve this week crossing through Nogales and McAllen. Grape Medley and Cherry tomatoes will remain very short. Quality on what is crossing is good.

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: Starting in California, NEW CROP.

Stone Fruit: Ramping up out of California.

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

Mangoes: Light 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.