



Weekly Market Review May 15, 2026

Overview

Markets continue to improve as Tomato production increases 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 shippers based on where they were growing and how their transition crops fared through the spring. The Lime market will start to ease back as more volume crosses 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. Squash and Bell Pepper are active this week.

Unfortunately, the market remains very volatile right now. We are experiencing high markets and shortages of multiple items. Cooler weather is still in the forecast, which has slowed growth patterns. Demand exceeds supply for many commodities. Broccoli, Broccolini, Celery, 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. Romaine coverage will be a large factor going into next week. While Iceberg is still limited, Romaine Lettuce will likely see severe prorates for next week. Growers anticipate that the weather conditions will create quality and supply issues for the next several weeks as well as loading delays.

Cantaloupe supplies have increased with both offshore and domestic products on the market, causing pricing to fall. Honeydew production is stable as offshore winds down and Yuma picks up. Pineapple availability remains tightened and we recommend having size flexibility. Mexican Avocado harvest has slowed down over the last two weeks causing field pricing to increase. An increase in supply from California, Peru and Colombia should keep the pricing increase at a minimum. Strawberries and Blueberries show improving supply trends with stronger quality, better field conditions, and increasing promotable volumes expected over the coming weeks. Raspberries continue to perform well despite extreme heat in Mexico, with stable quality and growing availability anticipated as Watsonville production builds. Blackberries remain the tightest category due to heat pressure in Mexico and limited domestic production, though California harvests are expected to improve supply gradually into early summer.

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. Cara-Caras are winding down and should be finishing soon. Domestic Meyer Lemons are available, and California Valencia's are beginning in a small way. 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*
- *Boston/Butter Lettuce – EXTREME*
- *Broccoli – EXTREME*
- *Broccoli Crowns Asian Cut – EXTREME*
- *Broccolini – ESCALATED*
- *Cabbage, Red – ESCALATED*
- *Carrots – EXTREME*
- *Cauliflower – EXTREME*
- *Celery – EXTREME*
- *Fennel, Anise – EXTREME*
- *French Beans – ESCALATED*
- *Green Leaf/Red Leaf Lettuce – EXTREME*
- *Lettuce – EXTREME*
- *Limes – ESCALATED*
- *Napa – ESCALATED*
- *Parsley Italian – ESCALATED*
- *Romaine – EXTREME*
- *Romaine Hearts – EXTREME*
- *Spinach – ESCALATED*
- *Table Grapes – ESCALATED*
- *Tomatoes (Rounds and Roma Tomatoes)*
 - *Mexico and Florida – ESCALATED*
- *White Asparagus – ESCALATED*

Watch List

1. *Blackberries*
2. *Cabbage, Green*
3. *Herbs*
4. *Pineapple*
5. *Ginger*
6. *Cantaloupe*
7. *Small Citrus Sizes across all Varieties*
8. *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 63.3-million-pound harvest for week 19, with 50.2 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 13.7-million-pound harvest with 27% 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: Markets are beginning to stabilize across the California growing regions as weather conditions continue to support improved quality, better field conditions, and more consistent harvesting patterns. While overall supply remains lower due to earlier seasonal disruptions and smaller sizing, production is trending upward with gradual volume increases expected over the next several weeks. As we move toward June, supplies are expected to become more promotable, with improved consistency, stronger quality, and better overall availability across both conventional and organic programs. Santa Maria conditions remain favorable, with stable weather patterns and improving fruit quality supporting steady production. Conventional and organic quality continue to improve, with stronger color, firmer fruit, and cleaner packs reported across most programs. Production is stabilizing following earlier weather disruptions, with volumes expected to gradually improve over the coming weeks as ideal growing conditions support better sizing and ripening. In Watsonville and Salinas, weather conditions have also been highly favorable, driving noticeable improvements in overall fruit quality and field conditions. Cleanup efforts following recent rain events have been successful, and production is now trending above expectations with measured week-over-week increases anticipated through June. While sizing remains smaller than earlier in the season, overall quality and consistency continue to improve, with peak production now expected in early to mid-June.

Blackberries: WATCHLIST Overall, BlackBerry supplies are expected to remain somewhat tight in the near term as Mexico moves past peak production and domestic programs are still in the early stages of harvest. Availability is expected to gradually transition over the next several weeks, with California production slowly increasing through June to help offset the seasonal taper in Mexico. While heat-related pressure continues to affect some quality characteristics in Mexico, overall supplies are expected to improve as domestic production gains momentum heading into early summer. Mexico continues to experience extreme heat, with daytime temperatures running well above seasonal norms and elevated overnight temperatures adding additional stress across berry programs. Blackberry quality has been impacted by the sustained heat, with approximately 80–88% of volume currently grading as Fancy, while Premium fruit has declined due to pressure on size and firmness. Despite these challenges, overall quality remains acceptable, with most defects manageable and growers continuing to maintain solid pack integrity. The region has recently passed peak production and is expected to gradually taper through May and June. Domestic conventional blackberry production remains very light, with only limited harvesting currently underway. More meaningful volumes are expected to begin in early June as crop development progresses. Early season fruit quality has been strong, showing large berry size, good sweetness, and minimal quality concerns. Organic blackberry production is now expected to begin approximately one to two weeks later than originally planned, shifting the start window into early July, though overall seasonal volume projections remain unchanged.

Raspberries: Overall raspberry supplies are expected to remain steady to improve over the coming weeks as Mexico continues to deliver stable production and California transitions further into spring harvest. While extreme heat in Mexico continues to create some growing stress across berry programs, raspberry quality and production have remained relatively unaffected compared to other categories. As Watsonville volumes continue to build gradually and Mexico approaches peak production, overall availability is expected to improve heading into late May and June, with promotable volumes anticipated as both regions strengthen simultaneously. Mexico continues to experience extreme heat, with daytime temperatures running well above seasonal norms and elevated overnight temperatures adding additional plant stress across berry programs. Despite these conditions, raspberries continue to perform well, showing strong color, firmness, and flavor, with the majority of lots packing into Premium and Fancy grades. Compared to blackberries, raspberries have demonstrated better heat resilience, and overall quality has remained stable with no major operational concerns reported. Peak volumes are expected to begin building toward the end of May and continue through June. Raspberry harvest is now underway in Watsonville, with early season production remaining light, which is typical for this stage of the crop. Fruit quality is reported as strong, with good firmness, attractive appearance, and slightly smaller sizing consistent with early production. Volumes

are expected to gradually increase through late May, with a more meaningful ramp anticipated heading into Memorial Day as spring production strengthens. Following the spring crop, a brief transition gap is expected before summer production begins, though timing will remain weather dependent. Overall, quality is expected to remain strong as production continues to build through the season.

Blueberries: Overall, Blueberry supplies are expected to remain adequate and improve over the next several weeks as Central Valley production continues to build and regional transitions progress across the industry. While Mexico has begun moving off-peak production, weather disruptions have created regional variability in the Southeast and increasing California volumes are expected to help support overall availability heading into late May and June. Supplies should continue trending more promotable as Central Valley production approaches peak and weather conditions stabilize across the major growing regions. Mexico is beginning to transition off peak production, though near-term volumes are expected to remain strong as the region gradually tapers through May. In the Southeast, recent storms impacted portions of Florida production, while Georgia continues to perform well with strong quality and stable harvest activity as fields dry out. Oxnard organics are effectively finished for the season, with only minimal final harvest activity remaining as pruning operations begin. Central Valley production continues to ramp toward peak, supported by strong sizing and overall good quality, though intermittent weather, labor constraints, and isolated quality issues, such as split and soft fruit, are being closely monitored as warmer temperatures move into the region.

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 175's and larger extremely tight. We are also seeing moderate pressure on quality with imperfections present, such as oleocellosis. The market will stay firm through Memorial Day; 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: 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 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. Cara-Caras are winding down.

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 now extremely limited. There have been reports of bruising, fringe burn, light weights, and mildew on the outer leaves. Growers are holding to averages when they can but severe prorates should be expected next week. **Romaine VA: EXTREME** Quality is okay, but supplies are extremely limited. Prorates should be expected. 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: Light 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: Lighter 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: Supplies stable on most varieties: Decent numbers crossing from Mexico; Coachella and South Georgia are ramping up as well. Markets will be shorter this week on Fresnos and Poblanos.

Tomatillo: Good supply and quality available this week.

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 French beans out of Guatemala remains fair, with production continuing to improve. Mexican French bean availability remains limited, as cooler weather continues to impact yields. Overall supply conditions are expected to improve within the next 7–10 days.

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 Cooler weather is expected across Southern California growing regions which may slow production. Basil supplies out of Baja are expected to remain steady, with continued warm weather supporting strong growing conditions for the crop. Overall herb supplies remain steady with fair quality across most items, with the exception of savory and lemon thyme, which continue to face some quality challenges.

Melons

Cantaloupe: Import production has increased as they make the final push to end the season. Domestic melons have started and there are plenty of cantaloupes available. Quality remains good with brix levels from 12-14%.

Honeydew: Production is steady as supplies from Yuma have started. 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 at a small capacity.

Mixed Vegetables

Artichokes: Quality and supplies are good.

Asparagus: EXTREME Mexican production out of Baja remains limited, though Washington is seeing improved production this week. Peruvian production remains steady for now, but seasonal declines are expected as southern fields begin to wind down. Michigan and Canadian production have started with light volumes due to cooler weather. Markets have become less active overall as additional domestic regions come online and demand softens following the holiday period.

Bok Choy: Quality is fair and supplies are limited.

Broccoli Florets/Broccoli Crowns: EXTREME Quality is fair, but supplies are limited. Reports of browning and pin rot continue. Growers are holding to averages.

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

Cauliflower: EXTREME Quality is good and supplies have improved. Some growers are holding to averages.

Celery: EXTREME Quality is just okay and supplies are limited. Disease pressure and increased demand are contributing to the increased pricing. Growers are holding to averages. The high market is expected to last 2-3 more weeks.

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

Fennel: EXTREME 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. 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: ESCALATED Quality looks good, but supplies are light.

Spinach: ESCALATED Supplies are a little tight but quality looks good. Reports of weak texture, discoloration, and wilting continue.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: WATCHLIST Supply of Guatemalan snow peas and sugar snaps remain steady overall. Mexican snow pea availability continues to be stable, while sugar snap supplies remain limited.

Onions:

California and New Mexico have started and supplies are stable, but pricing remains elevated. Supplies and pricing should get better when California moves from the desert to Central California.

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** 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** 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** Supply will remain firm on round tomatoes for another 10 to 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** 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 to 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.