



Weekly Market Review July 24, 2026

Overview

Tomato production continues to fluctuate in South Carolina, Tennessee, and Virginia due to rain, while Mexico's production of Rounds and Romas remains steady. We are finally starting to see some relief in the Snacking Tomato market, but we still expect some challenges over the next week. In California, Tomato production remains steady. The Lime market will begin to ease as more volume crosses the border, with peak sizing concentrated on smaller fruit. Sizes 175 and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks. Hot Pepper production is expected to stabilize for most varieties; however, Shishito, Habanero, and Red Fresno Peppers continue to be in the shortest supply. Table Grape supplies are steady this week, and quality is outstanding on the new crop out of California.

The market remains active but supplies and quality have improved. Celery is the current exception. Quality issues are causing shortages, and the market is responding accordingly. Disease and insect pressure will continue to reduce harvestable acreage; however, supplies are currently at steady levels for the rest of the commodities. Growers anticipate these challenges will remain a significant factor impacting supplies throughout the season, with Lettuce, Broccoli, Cauliflower, and now Celery availability is expected to remain difficult throughout the summer months. Broccoli and Cauliflower supplies have improved this week, but we will keep these items on the watch list. As temperatures increase in Salinas, these items could be further impacted. Artichokes and Anise/Fennel remain in limited supply and at the extreme trigger due to ongoing supply constraints.

The Avocado market remains stable as production from Mexico, California, and Peru continues to provide ample supply to meet current U.S. demand. Mexico is now primarily harvesting the Flor Loca crop, and the size profile is heavier on smaller fruit. California production is slowly starting to taper off but will continue to provide meaningful supplies through July and early August. Peru is expected to maintain good volume throughout the summer. Cantaloupe supplies have returned to normal, while Honeydew volume is expected to increase in the coming weeks.

Strawberry supplies are expected to tighten slightly in the near term due to lighter harvest volumes and warmer weather in Watsonville. At the same time, Blackberry availability remains tight until California production gains momentum. Raspberry supplies continue to provide strong market coverage and increasing harvests in California and the Pacific Northwest are supporting a smooth transition for Blueberries despite declining Mexican production. Overall, quality remains favorable across all berry categories, with regional weather and seasonal production shifts continuing to influence short-term market conditions.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including Lemons, Navels, and Valencias, with fruit generally trending larger. Some suppliers are holding averages on Lemons; please remain in close

contact with your supplier on this matter and provide ample lead time. California Valencias are in full swing, with Navels winding down. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. Grapefruit supplies are currently stable. Please begin considering imported citrus this summer, as it will help relieve strained sizing, particularly for East Coast demand.

Freight: Limited truck availability and record-high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including ocean freight providers, implement fuel surcharges that will impact cost inputs.

Market Alert List

- *Asparagus – EXTREME*
- *Artichokes 12ct – EXTREME*
- *Blackberries - ESCALATED*
- *Beans, Green – ESCALATED*
- *Celery – ESCALATED*
- *Celery Organic – EXTREME*
- *Fennel, Anise – EXTREME*
- *Honeydews – ESCALATED*
- *Limes (175's and larger) – ESCALATED*
- *Pepper Green Bells – ESCALATED*
- *Sugar Snap and Snow Peas – ESCALATED*
- *White Asparagus – ESCALATED*
- *Tomatoes, Snacking (Grape and Cherry) – ESCALATED*

Watch List

1. *Broccoli*
2. *Brussels Sprouts*
3. *Cabbage, Green*
4. *Cauliflower*
5. *Eggplant*
6. *Herbs*
7. *Ginger*
8. *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 sent 40.2 million pounds to the U.S. last week, most of which was the Flor Loca crop and the dry matter has dropped from 36% from the main crop, to 26% with Loca. California harvested 10.8 million pounds and has an average dry matter of 28%. Peru sent 11 million pounds with dry matter around 25%.

Bananas: Banana supply will be stable, but production is being curtailed due to 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. Bunker rates will be released this week and next; expect them to be higher due to rising fuel costs.

Pineapples: In the coming weeks, Pineapple supplies will tighten up due to the natural flowering process. Contract volume should hold firm, but open market availability will drop, causing pricing to increase. Suppliers are expecting this to last for 4 to 6 weeks. This should not affect quality, which has been good. In the meantime, supply exceeds demand, keeping market pricing stable.

Table Grapes: We have completely transitioned to California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead and there may be supply issues on the back end of the season.

Berries

Strawberries: Strawberry supplies remain centered in Watsonville and Salinas as the Santa Maria season has concluded, with production expected to resume later in July. Overall fruit quality continues to improve across both conventional and organic programs, with fewer defects reported, though occasional bruising, soft skin, and albino fruit remain. Recent warm weather in Watsonville has increased quality pressure, with growers reporting a rise in softer fruit and reduced shelf life in some lots. Harvest volumes are expected to decline approximately 25% over the next week as the current production cycle slows. Despite the lighter supply, overall quality remains favorable and should continue to support customer demand.

Blackberries: ESCALATED Blackberry supplies remain limited as Mexico has no available production, and California continues its seasonal ramp-up. Watsonville quality remains good, with conventional fruit showing excellent size and flavor, while organic production continues to develop following cooler-than-normal weather. Conventional volumes are expected to gradually increase toward the end of July, with organic harvest anticipated to begin during the first week of August. Market availability should improve as California production continues to build over the coming weeks.

Raspberries: Raspberry supplies remain favorable, supported by peak production in Mexico and improving harvest activity in Watsonville. Fruit quality remains strong across both regions, with excellent color, firmness, flavor, and overall appearance being reported. Mexican production is expected to remain at peak levels through July, while California volumes continue to increase as the season progresses gradually. Overall availability and quality are expected to remain strong throughout the remainder of the month.

Blueberries: Blueberry production continues its seasonal transition as Mexican supplies decline while California and the Pacific Northwest increase harvest activity. Quality remains excellent across domestic growing regions, with strong bloom, flavor, and overall fruit condition being reported. Pacific Northwest production continues to build, with Oregon well into production and British Columbia now harvesting, helping offset the seasonal decline in Mexico. Overall availability is expected to remain stable as domestic production continues to increase.

Citrus

Limes: ESCALATED Supply continues to improve despite heavy rains in Mexico; however, sizing issues continue on fruit out of Mexico and other regions across Central America. The size distribution will continue to skew heavily toward 230s and 250s. Unfortunately, this is leaving larger sizes. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next few weeks.

Lemons: 140s/165s/200s are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve. There are also averages in place.

Navels: Manifest is peaking on 72s/88s. Supplies are extremely tight on 113s and 138s. This is also putting pressure on the 88s; be prepared to be offered 72s on many orders.

Valencias: California Valencias have begun and are projected to have issues on sizing.

Mandarins: Mandarins are finishing up and imports are coming in. Stay in contact with your supplier on other varieties or imports as alternative options.

Grapefruit: California grapefruit available!

West Coast Lettuce

Iceberg: Lettuce quality is good; supplies remain limited but are improving. **Iceberg VA:** Quality is good; supplies remain limited but are improving. We have seen reports of short shelf life, insect pressure, and mildew in bags.

Romaine & Romaine Hearts: Supplies and quality are good. Organic Hearts remain at the extreme level. **Romaine VA:** Quality is good and supplies are improving. We are still seeing more core in the bags and some mildew.

Boston/Butter Lettuce: Quality and supplies look good.

Green Leaf, Better Burger and Red Leaf: Quality and supplies are good.

Green Bell Pepper: ESCALATED Supply is steady out of California; lighter supply out of the East due to ongoing rain and quality issues. Color Bell Pepper: Good supply is available out of Filmore/Somis, Baja, and South Georgia this week. Quality is outstanding on open-field varieties. The Hothouse Pepper category is steady out of Canada and Mexico. Overall quality is good.

Jicama: Stable supply and good quality available.

Mini Sweet Pepper: Supply will be tight this week. Quality remains good.

Mixed Chili Pepper: Supplies are stable on most varieties. Decent numbers are crossing from Mexico; Coachella and South Georgia are ramping up as well. Markets remain very short on Habanero, Fresnos, and Shishito. For Fresnos, we recommend substituting with Red Jalapeño.

Tomatillo: Good supply and quality available this week.

Eggplant: WATCHLIST Central Valley is seeing lighter numbers due to weather-related pressure. We hope to see this improve over the coming weeks. California quality is fair. We are mostly seeing Choice available, with #1 Fruit being limited. Local programs in the East (Tennessee, North Carolina and Michigan) are limited this week.

Slicer Cucumbers: Supply crossing through Otay Mesa and McAllen will tighten up as the season starts to close and production transitions to Baja. In the East, we are seeing good supply out of South Georgia, Tennessee and Michigan. Quality is good from all shipping points.

English Cucumbers: Excellent supply out of Canada and still some crossings available in McAllen. Quality is good.

Pickles: Lighter supply is available out of South Georgia and Tennessee, with limited supply out of Mexico. Quality is good.

Green Beans: ESCALATED Lighter supply out of South Georgia and Kentucky in the East. In the West, Orange County and Baja supplies are limited. Quality remains mixed; good in the West and mixed in the East.

French Beans: French bean supplies remain favorable as Guatemalan production continues at steady levels. Both organic and conventional supplies from Guatemala are readily available, while conventional production from Mexico also remains strong. Overall market conditions are balanced, with stable production supporting good availability and consistent quality across both growing regions.

Zucchini/Yellow Squash: Steady supply on Green and Yellow Squash out of South Georgia and Fresno. Markets were higher as demand came in a bit heavier than expected. Quality is good.

Herbs: WATCHLIST Herb supplies remain generally stable this week, with basil continuing to report good production, quality, and availability. Most herb varieties are seeing consistent market conditions, although oregano quality from Colombia remains affected by Rainfall, while chervil availability continues to be limited due to heat. Overall quality across the category remains favorable, with only isolated weather-related challenges affecting select items.

Melons

Cantaloupe: California supplies have returned to normal for this time of the year. Suppliers are reporting good sizing, strong external appearance and an excellent flavor profile. Production is expected to remain strong, moving forward. Fields are currently producing more 9s, while 12/15s are limited.

Honeydew: ESCALATED Honeydew production is increasing slowly, but the market has not reached a good supply level and pricing remains elevated. Available sizing is primarily 5s, 6s are limited and 8s are hard to find. Suppliers are asking for flexibility on sizing. Overall, the quality has been good.

Watermelon: The market has improved slightly as new growing areas out east have started harvesting. Production in the West has also increased but is still below levels from last year. Pricing remains elevated but should start to cool off, as more growing regions up north come on and the demand levels off.

Mixed Vegetables

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated. 12ct's remain at the extreme trigger.

Asparagus: EXTREME The asparagus market remains very active as demand continues to outpace available supply. Northern Peru continues to be the primary production region and is expected to support the market through the first half of August before the normal seasonal transition to Southern Peru begins. Mexican production remains very light and is expected to stay that way through the remainder of the month, keeping the industry heavily reliant on Peruvian supplies. While the transition into Southern Peru is expected to be orderly, temporary supply gaps may occur until harvest volumes increase.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality and supplies are good. A few reports of browning and pin rot continue. Organic Crowns remain at the extreme level. With insect pressure increasing, we will keep this item on the watchlist.

Broccolini and Sweet Baby Broccoli: Quality is good, but supplies are limited.

Brussels Sprouts: WATCHLIST Quality and supplies have improved.

Carrots (JUMBOS, MEDIUMS and CELLOS): Quality and supplies are good.

Cauliflower: WATCHLIST Quality and supplies are good. With insect pressure increasing, we will keep this item on the watchlist.

Celery: ESCALATED Quality is fair and supplies are tightening up. Disease pressure remains a factor and is affecting harvestable acres. The market is trending up. Organic Celery is still at the extreme level.

Corn, Sweet: Light supply and firm markets will continue out of South Georgia in the East and California, Oregon and Washington out West. We expect to see higher demand and higher market pricing through mid-July. Quality is good out of all regions.

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: Quality and supplies look good.

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: Supplies and quality are good.

Mushrooms: Supply is expected to be steady for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years, Canadian mushroom farmers received unfair subsidies, giving them a clear advantage over the domestic mushroom farming industry. The USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62–4.97%. These duties will be applied once the ruling is formally published. This will not only increase the price of imported mushrooms from Canada but will also put upward pressure on the price of domestically grown product as well. This is something domestic growers have been seeking for some time to support increases in their operating costs over the past five years.

Napa Cabbage: Quality and supplies have improved.

Parsley (Italian & Curly): Quality and supplies are good.

Rapini: Quality is good, but supply continues to be light. The market is strong; therefore, supplies are expected to remain light.

Red Cabbage: Quality looks good, but supplies are light.

Spinach: Supplies and quality look good.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: *ESCALATED* Snow pea and sugar snap pea supplies continue to improve as Guatemalan production increases, with sugar snap availability strengthening at a faster pace than snow peas. Domestic sugar snap supplies remain fair, while snow pea availability continues to be somewhat lighter. Overall market conditions are improving, and additional Guatemalan production is expected to provide stronger availability and more consistent coverage over the coming weeks.

Onions:

New Mexico volume has dropped off as suppliers deal with lower yields and seeder issues. Suppliers in California are also dealing with low volume as they work through transition challenges. Issues in both New Mexico and California are leaving the market limited on all sizes and colors, while pricing has jumped quickly. Production is expected to pick up in a few weeks.

Potatoes:

The market has strengthened as the size profile has shifted to finish out last year's crop. Suppliers are seeing a shift in the size profile toward smaller count sizes, 70–120ct, while 40–60ct have become tighter. Suppliers are watching inventories closely to make sure there is enough to last until new crop and to monitor quality issues. Shippers are requesting additional lead time and some flexibility on sizing when possible.

Sweet Potatoes: The sweet potato market has tightened as the industry moves into the final stretch of the 2025 storage crop. Limited supplies remain available nationwide, but inventories are gradually declining, particularly on premium U.S. No. 1 grades and larger counts. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market heading into summer. North Carolina and Mississippi growers are reporting lighter yields and tighter availability due to weather-related challenges from last season. Quality remains generally good; however, some lots are showing increased

cosmetic defects and shrink tied to weather stress from last growing season. New crop harvest is expected to begin in limited volumes during August, with broader availability arriving in September.

Tomatoes:

Tomato Suspension Agreement Update

Currently, duties are being imposed on Mexican tomatoes. We do expect to see some reporting from the ITC on the impacts of duties and anti-dumping violations sometime this year. NO major immediate changes are anticipated.

East Coast

- **Round and Roma Tomatoes:** Volume remains light this week out of Tennessee and North Carolina, mostly due to rain delays. Quality is mixed out of all regions. Small fruit is short, possibly requiring size substitutions.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Lighter volume this week on Grapes, Grape Medley, and Cherries due to transition and higher holiday demand. Markets are expected to remain active through the Fourth. Quality is fair at best.

Mexico

- **Round Tomatoes:** Supply will remain snug on larger-sized fruit this week. Quality is outstanding on what is crossing this week.
- **Roma Tomatoes:** Excellent supply and quality available out of Jalisco and Baja.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Grape Tomatoes and Cherries are very short this week due to lighter harvesting and higher demand. Medleys seem to be readily available. Quality on what is crossing the border has been good across all varieties.

California

Supply is steady across the Golden State! Crops look amazing; we expect a great California season on vine ripens as well as mature greens.

Other Fruit:

Apples: As we move through the summer storage season, Washington Apple inventories continue to trend below both last year and historical averages across many key varieties, supporting the firm pricing environment that has developed throughout 2026. According to the most recent storage reporting, total conventional Apple inventories stood at 39.4 million cartons, down 12% from 44.9 million cartons last year and slightly below the three-year average of 40.4 million cartons. The market will remain elevated until new crop Apples start in August.

Pears: D'Anjou availability is tight and primarily limited to U.S. #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 U.S. #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 Mexico.

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

Cherries: Good supply out of Washington State. NEW CROP.

Stone Fruit: Steady supply out of California and other local regions.

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

Mangoes: Steady supply out of Mexico, Peru and Puerto Rico. Varieties: Tommys and Ataulfo.

Kiwi Fruit: Supplies are fair out of Chile.

Quince: Limited supply available this week.