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Weekly Market Review
March 12, 2026

Overview

Cucumber and Squash from Mexico are showing some supply relief, though Florida remains short on Cucumbers while Squash availability improves. Florida is experiencing significant shortages in Tomatoes, Beans, Bell Peppers, and Corn. Hot Peppers are also in very tight supply across all categories.

Adverse weather in Yuma continues to impact lettuce with widespread mildew and increased insect pressure, limiting harvestable acreage and shelf life. Carrots, Celery, and Green Onions face ongoing constraints due to storm damage and disease, with full recovery not expected until April. Green Onions and Broccolini are at extreme supply levels. Broccoli, Celery, and Cauliflower show improved supplies this week, but growers anticipate intermittent gaps and early Yuma season completion, potentially leading to market instability due to prevalent insect pressure.

Recent frost events in Guatemala have impacted French Beans, Sugar Snap Peas, Snow Peas, and Baby Peeled Carrots, further tightening already limited supplies. Cold weather and frost in Guatemala, combined with port congestion in Guatemala and Honduras, are contributing to these issues. Table Grape supply is steady, with Red Grapes readily available and Green Grapes tighter. Lime availability will decrease due to reduced volume from Veracruz, Mexico, leading to higher markets and less availability across all sizes. Efforts are underway to secure alternative supplies from Colombia. Banana supplies are expected to tighten due to strong global demand and virus-related issues.

Cantaloupe volume has increased and should remain strong, but Honeydew supplies are declining due to Downy Mildew in Guatemala and Honduras. Pineapple availability has slightly improved, with a request for size flexibility. Avocado supplies are growing, with plentiful large and jumbo sizes from Mexico and California, while small sizes remain tight. Strawberry volumes are increasing from California and Baja Mexico, as production winds down seasonally in Central Mexico and Florida. Blueberry and Raspberry volumes are very low, with prorates likely in the coming weeks, especially Raspberries.

Citrus supplies are strong, favoring larger fruit sizes. California and Oxnard lemons are available, focusing on fancy/140+ counts, with limited smaller sizes. Navels and Cara-Carasare peaking on 72/88 counts, with tighter availability expected for 113/138counts. Mandarin availability varies, with ample larger sizes of Bloods and Minneolas, but scarce smaller Minneolas. California Rio Red grapefruit is available, and Texas Grapefruit supplies are expected through April. It is recommended to size up where possible and maintain close supplier communication.

Ongoing unrest in several Mexican states is disrupting agricultural regions, impacting field operations, labor, packing, and transportation, leading to expected volume reductions over the next 3–5 weeks.

Alert List

- Asparagus – ESCALATED
- Bok Choy – ESCALATED
- Blueberries – EXTREME
- Broccoli/Crowns– ESCALATED
- Broccolini – EXTREME
- Cauliflower – ESCALATED
- Celery/Celery Sleeved – ESCALATED
- Cilantro – ESCALATED
- Green Beans – EXTREME
- Fennel, Anise – ESCALATED
- French Beans – ESCALATED
- Honeydews – ESCALATED
- Hot Pepper: All Varieties – ESCALATED
- Leeks – ESCALATED
- Lettuce – ESCALATED
- Limes – EXTREME
- Napa – ESCALATED
- Green Onions – EXTREME
- Parsley Italian – ESCALATED
- Raspberries – EXTREME
- Romaine – ESCALATED
- Romaine Hearts – ESCALATED
- Snow Peas & Sugar Snap Peas – ESCALATED
- Sweet Corn – EXTREME
- Tomatoes (Rounds and Roma Tomatoes)
  - Mexico and Florida – EXTREME
- Tomatillos – ESCALATED
- Warm Veg Category (Florida) Corn, Beans, Cucumber, Bell Pepper, Eggplant – EXTREME
- White Asparagus – ESCALATED

Watch List

1. Cabbage, Red
2. Cabbage, Green
3. Lettuce, Red Leaf/Green Leaf
4. Herbs
5. Small Lemons
6. Pineapple
7. Ginger
8. Cantaloupe
9. Small Citrus Sizes across all Varieties

Weather

YUMA, AZ

Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19
95° | 58°F	96° | 63°F	94° | 59°F	96° | 65°F	99° | 71°F	101° | 70°F	104° | 69°F	106° | 72°F
Sunny	Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny

OXNARD, CA

Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19
79° | 59°F	78° | 55°F	70° | 54°F	71° | 56°F	74° | 59°F	77° | 59°F	77° | 59°F	76° | 59°F
Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Mostly Sunny

CULIACAN, SINALOA

Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19
98° | 58°F	96° | 56°F	98° | 58°F	96° | 58°F	96° | 59°F	94° | 61°F	95° | 61°F	98° | 62°F
Sunny	Sunny	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Sunny

HERMOSILLO, SONORA

Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19
100° | 63°F	99° | 62°F	97° | 61°F	98° | 61°F	101° | 64°F	102° | 65°F	102° | 67°F	108° | 70°F
Sunny	Sunny	Partly Cloudy	Sunny	Mostly Sunny	Sunny	Sunny	Sunny

JALISCO, NAYARIT

Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19
88° | 59°F	86° | 58°F	86° | 55°F	83° | 52°F	84° | 55°F	82° | 55°F	85° | 57°F	87° | 57°F
Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

VIZCAINO, BAJA SUR

Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19
98° | 60°F	97° | 59°F	97° | 58°F	95° | 57°F	95° | 59°F	94° | 60°F	94° | 62°F	96° | 63°F
Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

PLANT CITY, FL

Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19
84° | 61°F	83° | 65°F	83° | 65°F	84° | 67°F	78° | 45°F	60° | 44°F	66° | 48°F	74° | 50°F
PM Thunderstorms	Partly Cloudy	PM Showers	PM Thundershowers	Thunderstorms	Partly Cloudy	Partly Cloudy	Partly Cloudy

IMMOKALEE, FL

Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19
88° | 67°F	86° | 66°F	87° | 66°F	85° | 68°F	86° | 56°F	67° | 51°F	72° | 53°F	77° | 53°F
AM Clouds/PM Sun	PM Showers	PM Thunderstorms	Rain	Scattered Thunderstorms	AM Showers	Partly Cloudy	Partly Cloudy

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.

Fe

Avocados: Mexico had an 89.5-million-pound harvest for week 10, with 75.7 million pounds shipped to the U.S. Sizing continues to peak toward 40s-60s counts, while dry matter has climbed to 33%. There is still plenty of availability and the occasional sight of Lenticel due to rain throughout the season. The California season has started slowly with 2.4 million pounds, although the dry matter is only arounds 24%

Bananas: Banana supply will remain tight due to increased global demand and declining tropical production, exacerbated by virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program.

Pineapples: WATCHLIST The Pineapple market has begun to settle slightly but remains tight. Demand continues to be high, keeping pricing stable. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, the quality and taste are good.

Table Grapes: Quality is outstanding, and Brix are hitting the high teens. We seem to be in a good stride with stable availability on all three colors. Green varieties available: Sweet Globes. Red varieties: Red Globes, and Sweet Flavor. There are also generic varieties on all three colors available this week.

Berries

Strawberries: All California strawberry growing regions (Oxnard, Irvine, Santa Maria, Watsonville, and Salinas)are now in production. Favorable growing conditions have accelerated crop development, placing the season several months ahead of a typical schedule. Quality has been very good, with medium to large berries showing strong sheen, consistent color, and uniform shape. This is an ideal time to begin spring and summer promotions, as availability is expected to remain strong through the remainder of March and the Easter promotional period. Baja Mexico production remains steady with good overall quality. Florida production is steady, and good availability is expected over the next few weeks before the Florida season winds down. Central Mexico is in its final weeks of production for the U.S. markets.

Blackberries: Production continues in Central Mexico, though supplies have tightened in recent weeks as crops move past their seasonal peak, reducing overall availability. Volumes are expected to resume increasing by mid-March and stabilize as we move into April. The overall quality remains good.

Raspberries: EXTREMESupply and availability will remain limited throughout March and most of April. Pro-rates and potential cancellations should be expected based on daily supply conditions, and substitutions may occur on labels, organics, and pack styles when necessary. Several factors are contributing to the tight market, including Central Mexico reaching its lowest production levels as volumes decline from peak levels and fields are pruned in preparation for the next crop cycle. Additionally, ongoing reports of political unrest, violence, blockades, and operational disruptions continue to affect key growing regions, although these issues are receiving less national attention than in previous weeks. Central Mexico volumes are expected to remain low for the next 3 to 5 weeks, with meaningful recovery not anticipated until late April or early May. Some additional volume from Baja is expected to begin supplementing supply in early to mid-April. Overall production remains limited, though quality has been generally good.

Blueberries: EXTREMEProduction remains active in Central Mexico, but supplies are very tight as crops move past seasonal peak volumes. Mexican quality and sizing continue to perform well; however, overall availability will remain limited over the next several weeks as both South American and Mexican volumes decline, and the early Florida crop is expected to be significantly reduced. Many Florida growers are reporting crop losses of approximately 80–85 percent due to earlier freeze events, with some reporting losses of 50 percent or less.

Citrus

Limes: EXTREMESupply is much lighter this week out of Mexico as cooler weather and rain in January has impacted the current growing regions. We are seeing issues such as the size profile be heavy to the smaller fruit; we do anticipate this to improve over the next 3 to 4 weeks. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability expected through March and may need to shift supply from Mexico to Colombia to fill orders in certain cases.

Lemons (California & Oxnard)

- Availability: Strong across all sizes in both reporting houses.
- Grade & Size: Fruit is leaning towards a fancy grade, with peak availability on 140s and larger. Sizes 165/200 are slightly snug but overall supply is in good shape.

Navels (Domestic)

- Availability & Sizing: The manifest is peaking on 72/88 counts.
- Tight Counts: There is a significant lack of 113/138sizes,which is placing pressure on the 88s. Buyers should be prepared to receive 72s on many orders.
- Good Availability: Supplies are good for 72 count and larger.
- Origin: Domestic Navels are available from the Central Valley, with limited supply from Fillmore and Riverside.

Mandarins

- Availability: This is an area of supplier variability. Some shippers are reporting limited availability, while others have a comfortable supply.
- Recommendation: Maintain close contact with your suppliers to ascertain their current inventory levels and supply status.

Cara-Cara Oranges

- Availability & Sizing: All sizes are available, peaking on 72/88 counts. Similar to Navels, there is a lack of 113/138sizes,and the fruit is trending larger.

Blood Oranges

- Availability: Large sizes are readily available. Promotional volume may exist where supply is strong.

Minneolas (Tangelos)

- Availability & Sizing: All sizes are available, with a primary focus on large fruit.
- Tight Counts: Small sizes are tight.

California Rio Red Grapefruit

- Availability: California Rio Red Grapefruit is currently available.

Texas Citrus Overview:
General Trends: Texas is offering Valencia Oranges and Grapefruit, with supplies expected to last through April.

- TX Valencia Oranges
  - Availability: Limited Availability, with the manifest peaking on 72s.
  - Duration: Expect Valencia supplies to continue through April.
- TX Grapefruit
  - Availability: Shipping this week, peaking on 36/40 counts.
  - Duration: Plan for Texas Grapefruit supplies through April.

<u>West Coast Lettuce</u>
Iceberg: ESCALATED Lettuce quality and supplies are good but weights will be light. The market is active and weather has affected both harvesting and quality. Growers expect yields to be low because of insect pressure, mildew damage and cap leaves. Quality will be hit or miss. Shortened shelf-life issues should be expected.

Iceberg VA: ESCALATED Quality and supplies are just good. We have seen reports of short shelf life, insect pressure and mildew in bags.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine Heart quality and supplies are good. There have been reports of bruising, fringe burn, light weights and mildew on the outer leaves. Growers are holding to averages. Hearts are now at the extreme trigger. Supplies will continue to tighten up as we get closer to transition.

Romaine VA: ESCALATED Quality and supplies are good. We have seen more core in the bags and some mildew.

Boston/Butter Lettuce: Quality and supplies are good. Mildew and fringe burn pressure have been observed.

Green Leaf, Better Burger and Red Leaf: Quality and supplies are good for now. Mildew and fringe burn pressure persist, and carton weights remain light.

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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.

Color Bell Pepper: ESCALATED Lighter volume expected to continue out of Mexico due to cooler weather and insect pressure impacting yields while Florida will see very short supply due to last month's freeze. Markets are expected to be volatile through April. The Hot House Pepper category may see some volume in the next cycle that may bring some relief to this market over the coming weeks.

Mini Sweet Pepper: Supply will be stable over the next few weeks. Quality remains good.

Mixed Chili Pepper: ESCALATED Supplies are good out of Sinaloa and Sonora. Markets will be shorter this week on several varieties: Jalapeno, Serrano, Caribe, Habanero, Fresnos, and Shishito Pepper.

Tomatillo: ESCALATED We are starting to see some improvement on supply this past week. Quality and availability will continue to improve over the next 7 days. Markets to remain firm as demand shifts form the east to Mexico after last month's freeze.

Eggplant: EXTREME Domestic supply is very light this week out of Florida due to the freeze while crossings through Nogales remain strong. Best quality is out of Mexico.

Slicer Cucumbers ESCALATED: Supply crossing through Nogales and McAllen will begin to improve this week as we break new blocks in Sinaloa as well as Sonora. We will, however, see a split market and will still see firm prices due to Florida's losses from the freeze. Market volatility is expected through April.

English Cucumbers: Lighter supply and moderate demand have pushed pricing higher this week out of Nogales and McAllen. Quality is good.

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

Green Beans EXTREME: Florida's supply continues to be severely impacted by last month's freeze, leading to extreme shortages and market volatility over the coming weeks. "Act of God" declarations are being issued as market prices continue to rise daily, and the quality of available produce is fair at best. Mexico is also experiencing lighter availability due to cooler weather slowing production. We expect market shortfalls and challenges through early April.

French Beans: ESCALATED Supplies from Guatemala remain extremely limited due to earlier cold weather and frost events. Mexican French bean availability is also tight, as cooler temperatures continue to impact yields.

Zucchini/Yellow Squash: Supply improving on green but light on yellow over the next week with newer blocks coming on in Florida as well as Mexico. We should see better availability over the next week as well as much needed price relief.

Herbs: WATCHLIST Basil production and quality remain inconsistent due to cold weather in Mexico, heavy rainfall in Colombia, and ongoing USDA holds and fumigations. Cooler conditions continue to contribute to variability, with occasional tip burn possible during the winter months. Imported chervil supply has improved. Overall, other herb supplies are steady with fair quality, with the exception of tarragon, which remains more limited. Arugula and Cilantro are extremely limited from some growers and prorates should be expected.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	USA/MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Limited	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Limited	Steady	USA
Oregano	Steady	Good	USA
Italian Parsley	Limited	Limited	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA/MX
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Limited	Steady	MEX
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons WATCHLIST

Cantaloupe: There is a good mix of 9/12s available, while 15s are starting to increase. Quality overall continues to be good. Brix levels mostly range from 12-14%.

Honeydew: ESCALATED Fields in Guatemala and Honduras are reporting Downy Mildew, a virus that attacks the leaf coverage of the plant and drastically reduces yield, melon size and brix level. Suppliers feel this will last at least a month. Larger fruit will remain tight during this time, and flexibility on sizing will be required.

Watermelon: The market on seedless melons remains steady even with less Mexican crossing this week. Cooler temperatures in Guatemala have seen Watermelon production drop significantly and a shift in size from 45's to 36's. The freezing temperatures in Florida will likely play a role in early production set to start at the end of the month.

Mixed Vegetables

Artichokes: Quality and supplies are both good.

Asparagus: ESCALATED Mexican production has improved with more favorable weather conditions in the San Luis and Caborca regions. However, warmer temperatures are forecast across the growing areas, which may lead to increased tip feathering. Peruvian production is expected to begin in approximately three to four weeks. Markets have remained steady.

Bok Choy: ESCALATED Quality and supplies are okay.

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is good but supplies have tightened up. The rain and the warmer weather that Yuma experienced has led to quality and supply issues. Reports of browning and pin rot continue. Growers are holding to averages.

Broccolini and Sweet Baby Broccoli: EXTREME Quality is good, but supplies are limited with most growers. Weather has affected harvesting and quality. Growers are holding to averages.

Brussels Sprouts: Supplies and quality have improved. We are still combating insect pressure and internal browning but overall, quality is good. The market is no longer escalated and supplies should continue to improve as we shift growing regions.

Carrots (JUMBOS, MEDIUMS and CELLOS): Due to continued rain events, supplies are tight on Baby Carrots, Cellos, and Jumbos, with limited availability. Rainbow Carrots remain steady with good quality and supply. Harvesting has been challenging because of muddy fields. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Rainfall has affected harvesting for all of the growers. Cellos and Jumbos are the most heavily impacted. Prorates should be expected. Availability will remain limited until conditions improve. Growers request orders be sent in as early as possible. At least 7-10 days ahead of time.

Cauliflower: ESCALATED Quality is good, but supplies are tightening up. The market remains at the extreme level.

Celery: ESCALATED Quality is good, and supplies are still limited but care improving. Weather has affected harvesting and quality. Growers are holding to averages on VA and Carton Celery. We will not see full relief until April.

Corn, Sweet: EXTREME The west has reacted to the shortfalls out of Florida and is now seeing historically high prices across all markets. Florida has lost an estimated 80 percent of its current production cycle due to the freeze while Mexico production remains very light. Act of God Declarations on program business. We expect to see volatile markets through April. Quality will be fair at best and we are seeing attributes such as small ear and immature kernels amid this production shortfall as growers in Florida are basically salvaging what they can from their crops.

Fennel: ESCALATED Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

Kale: Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

Leeks: ESCALATED Quality and supplies look okay.

Garlic: Quality remains good, although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and market are steady.

Green Cabbage: WATCHLIST Supplies and quality are good, but the market is tightening up. We had added this to the watchlist as we expect supplies to tighten up as we get into March.

Green Onions: EXTREME Supplies are limited and quality is good. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging as we close in on transition. Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to averages and the market is trending down.

Mushrooms: Supply is expected to be steady for the next several weeks. Quality is good.

Napa Cabbage: Quality is good, but supplies are tight. The market is increasing.

Parsley (Italian & Curly): Supplies and quality are good.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

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

Spinach: Supplies remain limited. Reports of weak texture, discoloration, and wilting continue. We are also now seeing disease pressure and mildew which are further impacting yields.

Spring Mix: Supplies and quality are okay. Weather has affected harvesting and quality, causing additional supply issues. We are also now seeing disease pressure and mildew which are further impacting yields.

Snow Peas and Sugar Snaps: ESCALATED Guatemalan snow pea supplies are good, and sugar snap availability continues to improve. Mexican snow pea and sugar snap supplies remain fair at best as growers work through ongoing field transitions.

Onions:
The onion market remains stable. With harvest concluded, all products will ship exclusively from storage in the Pacific Northwest. While modest increases may occur, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

Potatoes:
Potato supply for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

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

Tomato Quality: We will continue to see pressure on the Tomato supply chain over the coming weeks as we navigate these markets. Color will be a major concern with vine ripes 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 and Roma Tomatoes: EXTREME Florida will see its lightest production week of the season this coming week, and markets will remain volatile through early May. We do expect the need to sub sizes and varieties to navigate this unprecedented weather event and are receiving Act of God Declarations from our Florida partners.
- Snacking Tomatoes: Grape Medley, Grape Tomato, Cherry Tomato: Supply was very short this week, and pricing was higher on cherry tomatoes and medley tomatoes; grapes were somewhat stable as it felt like there were a few more grapes on the market this week.

Mexico
- Round Tomatoes: ESCALATED Volume will gradually improve as Sonora starts to bring additional volume to market, however we continue to see stronger markets. Quality remains very good through McAllen and Nogales.
- Roma Tomatoes: ESCALATED There is a huge variance in quality and price this week; older production out of Sinaloa and new production out of Sonora and will be reflected in price. Markets will remain volatile due to the conditions in Florida pushing demand west.
- Snacking Tomatoes:
    - Grape Tomatoes, Grape Medley and Cherry Tomatoes: Improving supply and lighter demand has put downward pressure on price this week. Quality is outstanding.

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 100–175count 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 #1for 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 #1grade 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 #135–55ct sizes and should remain in the market for another month, with new crop Starkrimson pears expected to start mid-August. Both Bartlett and Bosc pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Limited Supply out of Israel.

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

Cherries: Lighter supply available out of Argentina and Chile.

Stone Fruit: Good supply on Peaches, Plums and Apricots currently out of Chile.

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

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

Kiwi Fruit: Supplies fair out of California as well as offshore landing on the East Coast.

Quince: Limited supply available this week.