



Fresh Is Everything

Weekly Market Review February 20, 2026

Overview

Tight market conditions continue across the vegetable category. Cool weather in Mexico and the freeze in Florida continue to impact production of **Tomatoes, Cucumbers, Squash, Beans, Bell Peppers, and Corn.**

Supply chain challenges—including limited equipment, driver delays, and overall transportation shortages amid strong demand—are adding pressure. We do expect to see Act of God Declarations start to be sent from the grower community in Florida.

Table Grape supply remains steady, with Red Grapes readily available and Green Grapes tighter. **Limes** are slightly softer with larger sizes easier to source. **Banana** supplies are expected to tighten due to strong global demand and virus-related issues, creating potential spot market pressure.

Arrivals of **Cantaloupes** and **Honeydews** from Guatemala have decreased, though demand is slowly improving with warming temperatures. Volume should increase toward the end of the month, and quality remains strong. **Pineapple** availability is slightly better but size flexibility is requested.

Avocado harvests in Mexico remain robust even after the Super Bowl. Large and jumbo sizes are plentiful, while small sizes are tight.

Asparagus supplies remain very limited due to the close of the Peruvian season and continued cool weather in Mexico.

Strawberry volumes rose slightly this week, while **Blueberries** remain constrained by weather disruptions and seasonal transitions, keeping markets firm.

Yumas continues to have warm temperatures. The adverse weather has created widespread mildew issues affecting **Lettuce** and **Tender Leaf** items, limiting harvestable acreage and shortening shelf life. **Spinach, Arugula, and Spring Mix** remain tight, with prorates likely.

Carrots, Celery, and Green Onions continue to be constrained by storm damage and disease, with full recovery not expected until March. **Broccoli and Cauliflower** are at extreme trigger levels, with potential prorates up to 50%. Broccoli is experiencing prorates of 60% with some growers.

Other crops including **Cilantro, Anise/Fennel, Leeks, and Napa Cabbage** are also limited. Growers anticipate intermittent supply gaps and early Yuma season completion, creating potential market instability.

California **Citrus** supply is generally good, with strong availability in large sizes for lemons, Cara Caras, and Mandarins. However, there is a significant strain on smaller navel sizes, with no 113/138s available and pressure on 88s, necessitating an increased likelihood of offering 72s. Valencias are finished in California but available from Texas. Minneolas, Bloods, and Pummelos also have good large-size availability.

EXTREME

Asparagus	Blueberries	Broccoli Crowns/Florets	Cauliflower	Celery
Green Beans	Green Onion	Lettuce Cello/Wrapped	Romaine Hearts	
Spinach	Tomatoes Rounds, Romas, & Snacking from Florida	Warm Florida Veg Beans, Corn, Cucumber, Eggplant, Bell Pepper, Soft Squash		

ESCALATED

Asparagus, White	Bok Choy	Broccolini	Cilantro	Fennel/Anise
Green/Red Leaf	Hot Peppers Red Fresno, Caribe & Shishito	Leeks	Limes	Romaine
Snow & Sugar Snap Peas	Strawberries	Tomatillos	Tomatoes Rounds, Romas, & Snacking from Mexico	

WATCHLIST

Banana	Cabbage Green	Cabbage Red	Cantaloupe
French Beans	Herbs	Honeydew	Pineapple
Raspberries	Small Citrus small citrus across all varieties		

Most California **Grapefruit** is done, with Rio Reds available in Riverside, while Texas Grapefruit is shipping. Please note that the rain forecast in California will cause harvesting challenges through the end of this week, further exacerbating the tight supply of smaller fruit. Please be prepared for substitutions!

We continue to see an approximate 10% shortage nationwide due to enforcement of government safety regulations. Freight rates remain high, and significant volatility will continue.

FRUITS & VEGETABLES

Avocados: Avocados: Mexico had 73.5-million-pound harvest for week 7, with 61.5 million pounds shipped to the U.S. Sizing continues to peak toward 48s and 60s count, while dry matter has climbed to 32%. There is still plenty of availability and the occasional sight of Lenticel due to rain throughout the season.

Bananas: **WATCHLIST** Banana supply will begin to tighten over the coming weeks as global demand increases and production in the tropics steadily declines. A combination of virus pressure, low yields, and increasing production costs has placed significant strain on this staple commodity. Overall, banana quality remains very good, and supply is adequate. The key to navigating the coming year will be consistency in supply, consistent ordering patterns, and staying proactive to address any potential issues that could impact the program.

BERRIES

Strawberries: **ESCALATED** Overall volumes saw a slight uptick this week, likely associated with softer demand following Valentine's Day. Oxnard and Santa Maria continue to experience rainfall, delaying harvests and reducing volumes. When conditions allow, crews are being sent in to harvest and strip plants impacted by rain-related damage. Out of Baja, conventional and organic production had been ramping up; however, continued rainfall has lowered volume forecasts. Quality remains good, though harvest activity has been sporadic due to wet conditions. Central Mexico production continues to decline as the season moves into its later stages. Overall quality remains good, with some reports of bruising. Multiple freeze events over the past several weeks reduced harvests and limited production in Florida. Field level quality challenges include water damage from prolonged frost protection, freeze injury, uneven ripening, and internal discoloration. Although Florida saw a temporary increase in volumes this week, this improvement is expected to be short-lived.

CITRUS

Limes: **ESCALATED** Supply is much lighter this week out of Mexico, Columbia and Peru due to cooler weather. Size profile continues to be heavy to the smaller fruit as of this week. As we get deeper into the new crop, we are starting to see more larger fruit out of Mexico due to the rain in Southern Mexico. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability expected through March.

California:

Lemons: Good availability in all sizes across Central Valley, Ventura Co., Coachella Valley, and Yuma. Fruit is leaning towards fancy grade, peaking on 140s and larger. 165s/200s are a bit snug. Domestic Meyer lemons are available to load in D1.

Navels: Manifest is peaking on 72/88s. Domestic Navels are available. No 113/138s are available, which is impacting 88s; be prepared for 72s to be offered. Good supplies on 72s and larger.

Cara-Cara Navels: Peaking on 72/88s with all sizes available. Similar to Navels, smaller sizes (113/138) are unavailable and fruit is peaking large, so sizing up is recommended. Loadings in the Central Valley.

Pineapples: **WATCHLIST** The Pineapple market has started to settle down some but remains tight. Demand remains high, keeping pricing stable. Our contracts continue to maintain their integrity; however, we will need to remain flexible regarding sizes to ensure the stability of the supply chain. 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.

Blackberries: Production continues in Central Mexico and Baja with good overall availability. Quality remains good, though some softness and occasional red cell or color reversion are being reported as a result of recent heat, rain, and humidity.

Raspberries: **WATCHLIST** Production remains active in Central Mexico and Baja, though supplies have tightened as crops move past seasonal peak volumes, resulting in reduced availability. Overall quality remains good; however, some instances of soft or overripe fruit are being reported due to recent heat, rainfall, and elevated humidity in the growing regions.

Blueberries: **EXTREME** Demand continues to exceed supply as Central Mexico production remains active but is tightening beyond seasonal peak volumes. Mexican quality and sizing remain strong; however, overall availability is expected to stay limited over the next several weeks as South American and Mexican volumes decline, and early Florida production may not be a meaningful factor in March. Early reports of freeze related crop losses in Florida could significantly impact the early spring crop.

Valencias: California Valencias are done for the season.

Texas Valencias are available as an option.

Mandarins: Mandarins are back and ready. California Mandarins are peaking on larger sizes (12/15/18s).

Minneolas: All sizes are available, with a focus on larger sizes. Small sizes are tight, so sizing up is advised.

Bloods: Ready to go with large sizes available.

Pummelos: Good volume on 6/8/10s, available in bulk bins.

California Rio Red Grapefruit: Rio Red Rubies are now available. 36/40s are tight.

Texas:

Lemons (Mexico): Wrapped for the season.

Navels / Texas Valencias: Texas Valencias are available and peaking on 72/88s. Plan to have Valencias through April.

Texas Rio Red Grapefruit: Shipping this week from Mission, TX, peaking on 48/36s. Large sizes are snug. Plan to have grapefruit through April. (Consider Texas for grapefruit if CA is out).

WEST COAST LETTUCE

Iceberg: EXTREME Lettuce quality and supplies are just okay, and weights will be light. The market is active, and weather has affected both harvesting and quality. Growers expect the market to continue to rise due to yields being low because of mildew damage and cap leaves. Quality will be hit or miss. Shortened shelf-life issues should be expected. Iceberg remains at the Extreme Trigger.

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

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, fringe burn, light weights and mildew on the outer leaves. Growers are beginning to hold to averages. Hearts are now at the EXTREME trigger. The market is trending upward, and supplies will continue to tighten up as we get into March.

EASTERN AND WESTERN VEGETABLES

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 was lighter this week due to the cooler and wet weather in Culiacan. Quality remains good.

Mixed Chili Pepper: ESCALATED Supplies are good out of Sinaloa and Sonora. Markets will be shorter this week on Caribe, Fresnos, and Shishito Pepper. We hope to see improvement next week on the short items. We do anticipate shorter availability on Anaheim and Poblano as Lent approaches; these items are a staple for stuffing with cheese and crab meat during the Holy season.

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 from 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.

Romaine VA: ESCALATED Quality and supplies are okay. 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: ESCALATED Quality and supplies are good for now. Mildew and fringe burn pressure persist, and carton weights remain light. Green Leaf and Ref Leaf at both now escalated. We are watching all lettuce items closely as the market is trending upward.

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

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

Slicer Cucumbers: ESCALATED Supply crossing through Nogales and McAllen improved this week as they break open new production. Quality is outstanding. Florida will be short due to last month's freeze and outside sourcing will be most likely for the Florida east coast markets out of Honduras and Dominican Republic. Market volatility is expected through April.

Green Beans: EXTREME Supply will be extremely short out of Florida due to last month's freeze. Expect to see volatility over the next several weeks. We do expect supply interruptions and Act of God declarations soon. Markets prices continue to increase daily, and quality is fair on what is available. Mexico is also seeing lighter availability due to cooler weather slowing down production. We expect this to continue through early April.

French Beans: WATCHLIST Production has slowed due to recent cold weather and frost conditions in Guatemala. Additionally, vessel delays into East Coast ports create inconsistent availability. In Mexico, French bean supplies are fair overall, though cooler temperatures are continuing to impact yields.

Zucchini/Yellow Squash: EXTREME Supply very short in Florida due to last week's freeze combined with lighter crossing through Nogales/ McAllen are pushing markets higher. Best quality is out of Mexico. We expect to see volatile markets through March.

HERBS

WATCHLIST BBasil 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	Limited	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	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Limited	Limited	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

MELONS **WATCHLIST**

Watermelon: The market on seedless melons have increased with less Mexican production. 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.

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: Honeydew production on 8ct remains limited, as mostly 5's and 6's makes up over 95% of production. The change in the growing regions will see less honeydew arrival over the next two weeks. Flexibility on sizing will be required during this period. Quality has been good and improving with Brix levels at 11-13%.

MIXED VEGETABLES

Artichokes: Quality and supplies are both good. Large sizes are still limited but supplies are improving.

Asparagus: EXTREME Mexican production remains limited due to cooler weather in the San Luis and Caborca regions, while Peruvian volumes continue to decline as the season winds down. With reduced output from both origins, markets are very active and supply is expected to remain tight over the next two weeks. Growers will work to cover as much demand as possible; however, size substitutions and prorates will likely be necessary until Mexican production rebounds and weather conditions improve.

Bok Choy: ESCALATED Quality and supplies are okay.

Broccoli Florets/Broccoli Crowns: EXTREME Quality is okay, and supplies have tightened up. The rain and the warmer weather that Yuma experienced has led to quality issues that will remain for the next few weeks. Reports of browning, pin rot continue. Growers are holding to strict averages when they can, but we are seeing prorates as severe as 50%.

Broccolini and Sweet Baby Broccoli: ESCALATED Quality is good, but supplies are extremely limited with most growers. Weather has affected harvesting and quality. Growers are holding to strict averages, when possible, but prorates should be expected. The market is escalated due to limited supplies.

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.

Cauliflower: EXTREME Quality is okay, but supplies have tightened up. The market is now at the Extreme level.

Celery: EXTREME Quality is good, and supplies are still limited. Weather has affected harvesting and quality, prorates should be expected on VA and Carton Celery is still being held to strict averages. We will not see full relief until April.

Corn, Sweet: EXTREME We will continue to see a split market on corn this week due to cold weather in Florida where prices are extremely high. Florida is currently evaluating losses; some growers have declared a complete loss for the remaining winter cycle. Higher demand is forcing FOB prices higher out of Mexico where supply has been somewhat stable and expect to see volatile markets through April.

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 extremely limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging though mid-February. Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to very strict averages, when possible, but prorates should be expected until we get into March.

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 (Curly, Italian): 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: EXTREME 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 are limited this week. 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, while Sugar Snap availability continues to be impacted by cold weather. Mexican Snow Pea and Sugar Snap supplies remain limited as growers work through ongoing field transitions. As a result, supplies are expected to remain limited over the next 5-10 days, with relief anticipated once the Baja season ramps up and begins contributing additional volume.

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.

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.

TOMATOES: EAST COAST

Round and Roma Tomatoes: EXTREME Markets are expected to be volatile through early May and hit and miss supply over the coming weeks as growers attempt to salvage what they can. We will continue to assess the freeze impacts with our growers and provide updates as soon as possible. We do expect the need to sub sizes and varieties to navigate this unprecedented weather event and expect to see Act of God Declarations from our Florida Partners.

Snacking Tomatoes EXTREME

Grape Medley, Grape and Cherry Tomatoes: Supply was very short this week, and pricing was higher. It did seem to feel there were a few more grapes on the market this week.

All other varieties: Medley and cherry remain very short.

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.

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. Burbanks will begin to ship in limited volume in mid-October, while Norkotahs will continue to make up the majority of supply. 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: MEXICO

Round Tomatoes: ESCALATED Volume is slowly improving, and demand from the east is higher offsetting the increase in volume. We will see stronger markets with very high FOB prices established over the next ten days. Quality remains very good through McAllen, and Nogales.

Roma Tomatoes: ESCALATED Volume will be lighter over the coming weeks due to virus pressure and growers not planting the acreage they typically do during the normal Sinaloa season. This reduction in acreage is mainly due to the volatility of duties and the dismissal of the suspension agreement. Demand from the east is higher as well due to the freeze which will push markets higher. Quality is fair crossing through McAllen, and Nogales.

Snacking Tomatoes ESCALATED

Grape Medley, Grape and Cherry Tomatoes: Lighter supply and higher demand from the east have pushed prices up a tad and expecting that trend to continue this week with the cold weather in Florida. Quality is outstanding.

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: 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.

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

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

Quince: Limited supply available this week.

