



Fresh Is Everything

Weekly Market Review May 1, 2026

Overview

We will continue to see “demand exceeds supply” conditions on **Tomatoes** this week, however, there is some good news to report. Growers have begun to break new fields and should see better quality and availability late next week. Until then we will continue to experience prorates and broader quality issues in the supply chain. We still highly recommend flexibility as Rounds will be the tightest and conditions will remain fluid day to day; we recommend subbing to Romas until supply improves.

Hot Peppers remain in very tight supply across all categories.

The **Lime** market will start to ease back as more volume crossed the border with peak sizing on small fruit. 175's and larger will be short with substitutions to smaller sizes necessary for the next several weeks.

Unfortunately, the market remains very volatile right now. We are experiencing high markets and shortages on multiple items. Rain and cooler weather are still in the forecast, which has slowed growth patterns. Harvesting is being affected by the rain. The cooler weather and the rain will limit supplies. Demand exceeds supply for many commodities. **Broccoli, Broccolini, Cauliflower, and Lettuce** have extremely limited supplies and are the extreme trigger. Prorates should be expected on all of those items. **Romaine/Romaine Hearts, and Celery** remain escalated due to limited supply and quality concerns. **Carrots** continue to face ongoing supply challenges, with full recovery not expected until May. **Artichokes, Bok Choy, and Napa** remain extremely limited and escalated. Growers anticipate that the weather conditions will create quality and supply issues for the next several weeks as well as loading delays.

Cantaloupes have another week of steady production before the offshore season starts to wind down. **Honeydew** saw an increase of product from Mexico and the market has settled. **Pineapple** availability has tightened up, and we recommend having size flexibility.

Avocados from Mexico had a solid harvest with Cinco de Mayo a week away.

Berry markets are mixed, with overall supplies on the incline after weather events and increased quality issues in key growing regions. Supply is building in several areas, with strong production and generally stable quality, despite some heat-related pressure on fruit condition. Over the coming weeks, expect improving availability and better consistency as multiple regions reach peak production, with markets stabilizing into May.

EXTREME					
	Asparagus	Bok Choy	Broccoli	Carrots	Cauliflower
ESCALATED					
	Celery	Lettuce & Napa	Raspberries	Romaine Hearts	Tomatoes Rounds & Romas from Mexico & Florida
WATCHLIST					
	Artichokes	Boston/Butter Lettuce	Broccolini	Corn	Eggplant
WATCHLIST					
	Fennel/ Anise	French Beans	Green/Red Leaf	Green Onion	Honeydew
WATCHLIST					
	Hot Peppers All Varieties	Limes	Parsley Italian	Romaine	Table Grapes
WATCHLIST					
	Blackberries	Cabbage Green & Red	Cantaloupe	Herbs	
WATCHLIST					
	Pineapple	Small Citrus all varieties	Sugar Snap and Snow Peas		

Citrus markets are experiencing tight supplies on smaller sizes across many varieties, including **Lemons, Navels, Cara-Caras, Minneolas** (ending in May, some suppliers are finished already), and **Blood Oranges**, with fruit generally trending large. Domestic **Meyer Lemons** are available, and **California Valencia's** are expected in late April/early May. **Mandarin** availability is mixed, and **Grapefruit** supplies are available. Please begin considering imports for this summer. They will offer relief on strained sizing- especially for people on the east coast.

Freight: Limited trucks and record high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including sea freight companies, invoking fuel surcharges which will impact cost inputs.

FRUITS & VEGETABLES

Avocados: Mexico had a 74.6-million-pound harvest for week 17, with 59.6 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. We will start to have less growers as the growing area moved to higher elevation. California reported a 13-million-pound harvest with 26% dry matter.

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

BERRIES

Strawberries: Overall supplies are improving following recent rain events over the past few weeks; however, elevated quality issues are expected to persist as fields continue to recover from excess moisture. Santa Maria and Watsonville have experienced cooler temperatures this week, which is helping stabilize conditions, though quality remains in a recovery phase. While the product remains workable, some variability should be expected. The Watsonville region is projected to rebound with increasing volumes as it approaches peak production in mid-May.

Raspberries: **EXTREME** Weather conditions across Mexico remain hot, though temperatures have moderated slightly from earlier in the week. Prolonged heat is beginning to impact fruit condition, particularly in blackberries, while operations continue to run on schedule and volumes are moving as forecasted. Raspberries continue to perform well under current conditions, with strong color, firmness, and flavor, and most lots grading into Premium and Fancy categories. The crop has shown greater heat resilience than blackberries, with stable quality and no major operational concerns. Peak raspberry volumes are expected toward the end of April and will continue through May.

Blackberries: **WATCHLIST** Weather conditions across Mexico remain hot, though temperatures have moderated slightly from earlier in the week. Persistent heat is beginning to impact fruit condition, particularly in blackberries, while operations continue to run on schedule and volumes are moving as forecasted. Blackberry quality has seen some pressure from the heat, with approximately 80–88% of volume grading as Fancy and a reduction in Premium fruit due to impacts on size and firmness. Despite this, overall quality remains acceptable, with most defects manageable and growers maintaining strong pack standards. The region is currently in peak production, with elevated volumes expected to continue over the next two months.

Pineapples: **WATCHLIST** The Pineapple market will remain tight for at least the month of April. 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: **WATCHLIST** Quality is outstanding 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 scratching this week and expect volume by the first or second week of May crossing through McAllen and Nogales. Pricing will continue to climb over the coming weeks, we will not see relief until new crop out of Mexico starts over the next few weeks.

Blueberries: Supplies have increased significantly on blues over the past 7 days and should continue over the coming weeks. Mexico remains in peak production with stable forecasts and strong overall crop conditions. Current pack plans are focused on 6 oz, with pint availability expected to begin next week. Fruit size, consistency, and quality continue to meet expectations, and while warmer temperatures are limiting some afternoon harvest windows, overall volume projections remain unchanged. Peak production is expected to continue through mid-April into early May. The Southeast continues to experience warm, dry conditions, with limited rainfall impacting fruit sizing, particularly in Georgia. Florida production remains well below historical levels due to earlier frost damage and uneven crop development, resulting in reduced weekly output and downward-adjusted estimates. Georgia is just beginning harvest with very light early volume, primarily from initial picks, with gradual increases expected as the week progresses. Early production will focus on smaller pack sizes to align with demand. Organic production in Oxnard remains steady as the region moves toward the end of its season. Minor weather disruptions had a limited impact, and quality remains strong with consistent packouts. Current pack plans are focused on pints while supporting other committed businesses. The region is expected to taper through the coming weeks, with the season concluding in early May and availability remaining limited. The Central Valley crop remains on track, with no significant disruptions following recent storm activity. Organic production is aligned with expectations, and field conditions remain stable. Conventional programs are preparing for startup, with limited early harvest possible late next week, though meaningful volume is not expected until early May. Forecasts remain unchanged pending further field evaluations.

CITRUS

Limes: ESCALATED Supply continues to improve but still experiencing issues with sizing on fruit out of Mexico and other regions across Central America; the size distribution will continue to skew heavy to 230 ct and 250s. Unfortunately, this is leaving larger sizes such as 200's, 175's and 150's extremely tight. We are also seeing moderate pressure on quality with imperfections present, such as oleocellosis. The market will firm up this week as pull for Cinco De Mayo continues this week; however, the long-term outlook remains consistent with downward pressure on FOB prices. Subbing to smaller sizes will be necessary through May to keep the supply chain stable over the next several weeks.

Lemons: 40/165/200's are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve. Domestic Meyer lemons are available.

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.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine Hearts quality is good, but supplies are tightening up. There have been reports of bruising, fringe burn, light weights, and mildew on the outer leaves. Growers are holding to averages. Hearts are now at the Extreme level.

EASTERN AND WESTERN VEGETABLES

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

Color Bell Pepper: Good supply available on color pepper out of Florida and Mexico. The Hot House Pepper category steady out of Canada and Mexico. Overall, quality is good.

Jicama: New crop available. Quality is excellent.

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

Mixed Chili Pepper: ESCALATED Supplies are very tight out of Sinaloa and Sonora. We are starting to see some light numbers out of Coachella this week but nowhere near the volume needed to impact markets. The East coast should ramp up late May. Markets will be shorter this week on several varieties: Jalapeno, Serrano, Anaheim, Caribe, Habanero, Fresnos, Poblanos, and Shishito Pepper.

Tomatillo: Better supply available this week and quality is good.

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

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

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.

Valencias: California Valencia's are set to begin late April/early May.

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

Cara-Cara, Minneolas Bloods: Still peaking large. Tight on the smaller sizes.

Grapefruit: California Star Rubies now available.

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

Boston/Butter Lettuce: ESCALATED 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.

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

Slicer Cucumbers: Supply crossing through Nogales and McAllen is good with excellent quality available. In the east we are seeing good supply out of Florida and South Georgia. Overall east coast quality is good.

Green Beans: Florida has transitioned to new crop and supply has improved as well as quality. Mexico is still harvesting and expect to until California ramps up. Quality is mixed- Florida is excellent (new crop), Mexico is hit and miss as the season winds down.

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

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

HERBS

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

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

Watermelon: The market has seen an increase of Mexican product crossing, creating opportunities for buyers. Florida is about a week away from starting.

Cantaloupe: **WATCHLIST** Import production has increased as they make the final push to end the season. Domestic melons will start slowly next week. Quality remains good with brix levels from 12-14%.

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

MIXED VEGETABLES

Artichokes: ESCALATED Quality is okay, but supplies are extremely limited. Heavy mildew pressure is keeping all sizing limited. Expect limited supplies for the next 2 to 3 weeks.

Asparagus: EXTREME Mexican production out of Baja remains limited, with Washington also continuing at low volume levels. Peruvian production is steady for now, though a seasonal decline is expected over the next two weeks as southern fields wind down. Michigan and Canadian production are anticipated to begin within the next 10–14 days, which should provide some additional supply. Markets remain highly active amid current supply constraints and regional timing transitions.

Bok Choy: EXTREME Quality is fair and supplies are limited.

Broccoli Florets/Broccoli Crowns: EXTREME Quality is fair, but supplies are extremely limited. Reports of browning and pin rot continue. The market continues to rise. Prorates should be expected.

Broccolini and Sweet Baby Broccoli: ESCALATED Quality is good. Supplies remain light with some growers. Growers are still holding to averages.

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 late April, early May. Growers request orders be sent in as early as possible. At least 7-10 days ahead of time.

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

Corn, Sweet: Markets are starting to ease back as growers break new production and have increased availability out of Florida while in the west, we are in transition to the desert and quality looks good. We expect to see improved supply and continued improvement on quality over the coming weeks. South Georgia will start production right around Memorial Day.

ONIONS:

With storage crops mostly finished and rain in Texas, the market has firmed up quickly. California has also started and will be the main supplier until New Mexico starts in May.

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

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

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

Leeks: Quality and supplies look okay.

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

Ginger: Supplies and market are steady.

Green Cabbage: WATCHLIST Supplies and quality are good.

Green Onions: ESCALATED Quality looks good and supplies have improved but some 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 (Curly, Italian): ESCALATED Supplies are good, but some growers have light supplies. Italian Parsley remains escalated.

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

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

Spinach: Supplies and quality look good. Reports of weak texture, discoloration, and wilting continue.

Spring Mix: Supplies and quality look good.

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

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.

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 ripens 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.

TOMATOES: MEXICO

Round & Roma Tomatoes: EXTREME/ACT OF GOD Florida will begin to see additional volume late next week as growers break new fields. While this is great news, short term we will continue to see challenges as current volume continues to be critically low and will be in a **"Demand Exceeds Supply"** condition with prorates and shorts continuing. We need to be flexible, having the ability to sub-size and varieties where possible to navigate the lack of supply from our Florida partners. Quality will be fair at best but should start to improve late next week.

Grape Medley, Grape and Cherry Tomatoes: Volume improving grape tomatoes while medley and cherries remain 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.

TOMATOES: EAST COAST

Round Tomatoes: EXTREME/ACT OF GOD "Demand Exceeds Supply" Volume will continue to be short this week and will need to be flexible on sizing; with that said, substitutions to romas will be likely. Fortunately, this is expected to slowly improve by late next week as newer regions in Baja and Southern Mexico begin to break new fields. We are seeing some very light picks start out of Baja so there may be some relief soon. Expect to see color challenges, prorates and outright cuts over the next several weeks. Quality will be mixed; older fruit will have more imperfections while fruit from newer production will see far better quality.

Roma Tomatoes: EXTREME There is a huge variance in quality and price this week; older production out of Sinaloa is riddled with Blight and compromised which will cause a dramatic drop off in volume, Fortunately we are seeing newer production out of Sonora, Baja and Jalisco ramp up and where quality is strong and will call for a premium. Demand remains strong with rounds being short however expect to see more volume by late next week. Markets are volatile and will change daily. We suggest being flexible on sizing and open to subbing rounds during this market condition.

Snacking Tomatoes: ESCALATED 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.

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

Quince: Limited supply available this week.



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