



Fresh Is Everything

# Weekly Market Review May 15, 2026

## Overview

Markets continue to improve as **Tomato** production increases out of Florida and Mexico. We should start to see more availability this week; Romas will be plentiful while Rounds and Cherry Tomatoes will remain on the lighter side. Substitutions can begin to ease back this week for some shippers based on where they were growing and how their transition crops fared through the spring.

**Squash** and **Bell Pepper** are active this week.

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

Unfortunately, the market remains very volatile right now. We are experiencing high markets and shortages on multiple items. Cooler weather is still in the forecast, which has slowed growth patterns. Demand exceeds supply for many commodities.

**Broccoli, Brocolini, Celery, Romaine, Red Leaf, Green Leaf, Boston/Bibb** and **Iceberg Lettuce** have extremely limited supplies and are the extreme trigger. Prorates should be expected on those items. **Carrots** continue to face ongoing supply challenges, with full recovery not expected until the end of May. **Romaine** coverage will be a large factor going into next week – while Iceberg is still limited, Romaine will likely see severe prorates.

**Cantaloupe** supplies have increased with both offshore and domestic product on the market, causing pricing to fall. **Honeydew** production is stable as offshore winds down and Yuma picks up. **Pineapple** availability remains tightened – recommend size flexibility.

Mexican **Avocado** harvest has slowed; an increase in supply from California, Peru and Colombia should keep pricing pressure at a minimum.

Berry supplies are improving – **Strawberries** and **Blueberries** show stronger quality and rising promotable volumes. **Raspberries** are stable despite heat in Mexico. **Blackberries** remain the tightest category as Mexico moves past peak and California fields ramp gradually into early summer.

Citrus markets are tight on smaller sizes across many varieties – **Lemons, Navels, Cara-Caras,** and **Blood Oranges,** with fruit generally trending large. **Cara-Caras** are winding down. Domestic **Meyer Lemons** are available, and California Valencias are beginning in a small way. **Mandarin** availability is mixed; **Grapefruit** supplies are good. Please begin considering imports for this summer – they will offer relief on strained sizing, especially for East Coast.

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

EXTREME					
ESCALATED					
WATCHLIST					

## FRUITS & VEGETABLES

**Avocados:** FOBs continue to climb and we expect an elevated, volatile market for at least the next four weeks. Field prices have risen rapidly over the past two weeks as packers compete for limited fruit, and overall industry inventories are tightening faster than normal.

Mexico: The main crop is entering its final seven weeks, with fewer active growers and many slowing or delaying harvests in anticipation of stronger late-season pricing. APEAM estimates roughly 330M lbs remain in Michoacán, with about 250M lbs expected to ship to the U.S. — an estimated 36M lbs/week, well below current U.S. consumption of more than 60M lbs/week. California: Production continues to ramp but is currently contributing only 13–15M lbs/week. Looking ahead: The Flora Loca crop is expected to begin in July with Peru ramping up around the same time; early projections indicate Flora Loca volume could be down ~9% year-over-year. Historically this transition brings elevated field costs and added market volatility — we expect field costs to continue trending upward in the coming weeks. Our suppliers are working closely with their field teams to mitigate additional increases wherever possible; the primary focus remains on maintaining supply continuity and protecting customer programs during this volatile stretch.

## BERRIES

**Strawberries:** Markets are stabilizing across California growing regions as weather supports improved quality, better field conditions, and more consistent harvesting. Overall supply remains lower due to earlier seasonal disruptions and smaller sizing, but production is trending upward with gradual volume increases over the next several weeks. Moving toward June, supplies are expected to become more promotable across both conventional and organic. Santa Maria conditions are favorable with stable weather. Watsonville and Salinas have recovered well from recent rain — production is trending above expectations, with peak now expected early to mid-June.

**Blackberries:** **WATCHLIST** Supplies are expected to remain somewhat tight near term as Mexico moves past peak and domestic programs are still early. Availability will transition gradually with California production slowly building through June. Heat in Mexico continues to pressure quality — approximately 80–88% of volume is grading Fancy while Premium has declined. Domestic conventional production is light, with more meaningful volumes in early June. Organic blackberry is now expected to start one to two weeks later than originally planned, shifting into early July.

**Bananas:** Supply will remain tight due to increased global demand and declining tropical production, exacerbated by virus pressure, low yields, and rising costs. Quality is very good and current supply is adequate, but consistency will be crucial. Maintain regular ordering patterns and address potential issues proactively.

**Pineapples:** **WATCHLIST** The market remains tight as demand continues to be high. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Quality and taste are good.

**Table Grapes:** **ESCALATED** Quality remains strong on the red and black varieties with good sizing and brix are hitting the high teens. Availability is tightening daily as the offshore season closes. As the crop ages, expect more ambering in greens as well as dehydration in stems and shatter. Mexico will start sending significant volume next week with Coachella scratching by the second week of May.

**Blueberries:** Supplies are adequate and improving over the next several weeks as Central Valley production builds and regional transitions progress. Mexico is moving off peak; weather disruptions have created regional variability in the Southeast and increasing California volumes are expected to help support overall availability heading into late May and June. Supplies should continue to trend more promotable as Central Valley production approaches peak and weather stabilizes. Oxnard organics are effectively finished. Central Valley production is ramping toward peak with strong sizing and good quality, though intermittent weather, labor constraints, and isolated quality issues are being closely monitored.

**Raspberries:** Supplies are expected to remain steady-to-improving over the coming weeks as Mexico delivers stable production and California transitions further into spring harvest. Raspberries continue to perform well, showing strong color, firmness, and flavor with the majority of lots packing into Premium and Fancy. Compared to blackberries, raspberries have demonstrated better heat resilience. Peak volumes are expected to build toward the end of May and continue through June. Harvest is underway in Watsonville with light early-season production typical for this stage.

## CITRUS

**Limes: ESCALATED** Supply continues to improve but still experiencing issues with sizing on fruit out of Mexico and other Central American regions; size distribution skews heavy to 230 ct and 250s. Larger sizes such as 175's and larger are extremely tight. Moderate pressure on quality with imperfections including oleocellosis. The market will stay firm through Memorial Day; the long-term outlook is consistent with downward pressure on FOB prices. Subbing to smaller sizes will be necessary through May.

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

**Navels:** Manifest is peaking on 72/88's. Extremely tight on 113's and 138's. This is also putting pressure on the 88's – be prepared to be offered 72's on many orders.

**Valencias:** California Valencia's are set to begin in a small way.

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

**Cara-Cara & Bloods:** Still peaking large. Tight on smaller sizes. Cara-Caras are winding down.

**Grapefruit:** California Grapefruit available!

## WEST COAST LETTUCE

**Iceberg: EXTREME** Lettuce quality is fair and supplies are extremely limited. Weights will be light. The market is active and weather has affected both harvesting and quality. Growers expect yields to be low because of insect pressure, mildew damage, and cap leaves. Quality will be hit or miss. Shortened shelf-life issues should be expected. Growers are holding to averages when they can but prorates should be expected. We will likely not see full relief until the end of May.

**Romaine & Romaine Hearts: EXTREME** Quality is fair, but supplies are now extremely limited. Reports of bruising, fringe burn, light weights, and mildew on outer leaves. Growers are holding to averages when they can but severe prorates should be expected next week.

**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: EXTREME** Quality is okay, but supplies are extremely limited. Prorates should be expected. Seeing more core in bags and some mildew.

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

**Green Leaf, Better Burger and Red Leaf: EXTREME**

Quality is good, but supplies are limited. Mildew and fringe burn pressure persist, and carton weights remain light.

## EASTERN AND WESTERN VEGETABLES

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

**Color Bell Pepper:** Lighter supply out of Florida and Mexico. Hot House Pepper category steady out of Canada and Mexico. Coachella should start by mid-May. 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:** Supplies stable on most varieties – decent numbers crossing from Mexico; Coachella and South Georgia are ramping. Markets will be shorter this week on Fresnos and Poblanos.

**Tomatillo:** Good supply and quality available this week.

**Pickles:** Lighter crossings available out of Central Florida and Nogales. Quality is good.

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

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

**Slicer Cucumbers:** Supply crossing through Nogales and McAllen will tighten up as the season starts to close. In the east we are seeing good supply out of Florida and South Georgia. Quality is good from all shipping points.

**Green Beans:** Florida transitioned to new crop and supply has improved as well as quality. Mexico is still harvesting and expects to until California ramps up. Quality is mixed – Florida excellent (new crop), Mexico hit and miss.

**French Beans: ESCALATED** Supply out of Guatemala remains fair, with production improving. Mexican availability remains limited as cooler weather impacts yields. Overall conditions expected to improve within the next 7-10 days.

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

## HERBS

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

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA / MEX
Bay Leaves	Steady	Steady	USA / COL
Chervil	Limited	Steady	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	USA / MEX
Cilantro	Steady	Steady	Costa Rica
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 / MEX
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA / MEX
Savory	Steady	Steady	USA
Sorrel	Steady	Steady	USA
Tarragon	Limited	Steady	MEX
Thyme	Steady	Steady	USA / MEX
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 has started in a small capacity.

**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:** Production is steady as supplies from Yuma have started. Quality on both offshore and Mexican has been clean with good brix.

## MIXED VEGETABLES

**Artichokes:** Quality and supplies are good.

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

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

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

**Broccolini and Sweet Baby Broccoli: ESCALATED** Quality is good, but supplies are very limited. Growers are still holding to strict averages but prorates should be expected.

**Brussels Sprouts:** Supplies and quality are good. We are still combating insect pressure and internal browning but overall, quality is good.

**Carrots: (JUMBOS, MEDIUMS and CELLOS) EXTREME** Supplies remain tight on Baby Carrots, Cellos, and Jumbos. Rainbow Carrots remain steady with good quality and supply. Prorates should be expected. Availability will remain limited until conditions improve in the next few weeks. Growers request orders be sent in as early as possible. At least 7-10 days ahead of time.

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

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

## ONIONS:

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

## TOMATOES: MEXICO

**Round Tomatoes: ESCALATED** Supply will remain firm on round tomatoes for another 10 to 14 days but should improve as newer blocks break on Baja and Southern Mexico. Quality is outstanding on what is crossing this week.

**Roma Tomatoes: ESCALATED** Improving supply and quality available out of Jalisco and Baja. We expect this trend to continue and get back to a stable market over the next 7 to 10 days.

**Grape Medley, Grape and Cherry Tomatoes:** 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.

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

**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:** 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: ESCALATED** 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: ESCALATED** 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** Supply of Guatemalan snow peas and sugar snaps remain steady overall. Mexican snow pea availability continues to be stable, while sugarsnap 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.

## TOMATOES: EAST COAST

**Round Tomatoes: ESCALATED** Volume will begin to improve over the next ten days as growers break new fields. We should see continued consistency of supply and much better quality over the coming weeks.

**Roma Tomatoes: ESCALATED** Steady supply and good quality expected over the next ten days as grower break new fields in Central Florida. We expect to see normal supply in 7 to 10 days.

**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.

## DAIRY:

NZ/EU prices were mostly higher with the U.S. feeling firmer, though prices set back a bit late week. U.S. production data leaned supportive for cheese and butter (both weaker than forecast, up just 1.2%) and bearish for NFDM/SMP and dry whey (both stronger than forecast and up year-over-year NFDM+SMP production has been up 7 of the past 9 months despite the persistent narrative of weakness. U.S. exports and domestic demand for skim powder are better than expected, but the record-high price remains hard to explain on fundamentals alone.

**Pears: D'Anjou** availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. **Red D'Anjou** pears are moderately available in US #1 35-55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

**Pomegranate:** Limited Supply out of Israel.

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

**Cherries:** Starting in California, NEW CROP.

**Stone Fruit:** Ramping up out of California.

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

**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.

## SHELL EGGS:

National FOB shell egg weighted average prices are steady to higher; undertone is firm. Demand into retail channels ranges light to instances fairly good; loose egg movement moderate to instances light. Offerings light to moderate – Jumbo remains tightest. Supplies moderate to at times heavy. Market activity moderate to slow. California weighted average delivered prices are mostly higher with a firm undertone; retail demand light to instances fairly good, institutional light to moderate.

Source: USDA Livestock, Poultry & Grain Market News (May 14, 2026).

## PROTEIN:

**Beef:** Live cattle closed at \$258.52 (+\$3.50 WoW), with new trades starting at \$260. The Choice cutout remains flat versus typical seasonal uptick, with Choice down \$0.72 and Select down \$2.04/CWT last week. Harvest came in at 527k head (-34k YoY)— running ~2% above last week but 4% below year-ago levels —reinforcing a tighter supply backdrop. Packer margins remain deeply negative at -\$233/head. Rounds are being diverted into grinds as processors supplement lean trim ahead of Memorial Day. Middle meats steady with demand yet to fully materialize. Primal direction: Chuck, Rib, Loin, Round, Thin Meats, Grind — all trending up.

**Pork:** Harvest came in at 2.45M head (+4k WoW, +18k YoY); cutout declined \$2.05 on weakness in picnics, hams, and bellies. Butts, ribs, and loins continue to anchor the cutout and should maintain seasonal momentum, supported by export demand. Bellies and hams remain under pressure on unseasonably weak demand as QSR bacon movement underperforms and deli ham softens. Hog weights moved up 0.3 lbs — a counter-seasonal signal. Primal direction: Butts, Loins, Ribs trending up; Hams, Bellies, Trim trending down.

**Chicken:** WOGS of all sizes begin the day at least steady. Offerings for 3 lb birds are down; 4 lb birds are up. Bone-in breasts steady; demand for Jumbo and Medium continues to fall short. Select boneless breast steady. Tenders maintaining a steady tone. Chunk and trim steady. Leg quarters and bone-in thighs full steady with demand higher than recent past; supplies short to moderate. Offerings of thigh and leg meat remain challenging. Export remains steady.

**Turkey:** Frozen 8–16 lb hens and 16–24 lb toms steady; demand light, offerings light. Commodity Grade A 8–16 lb hens offered at 171–180 and 16–24 lb toms at 172–180 cents FOB. White meat and white trim steady to weak with light demand and offerings. Consumer and institutional breasts steady to weak. Tom drums, full-cut, and V-type wings steady to weak. Thigh meat steady, offerings very light. MST market steady to weak; trading slow on export with spot weakness.

## OTHER COMMODITIES:

**Seafood:** Pricing broadly steady week-over-week across shrimp (domestic and imported), salmon (Fresh Chilean down), tilapia, pangasius, scallops, swordfish, king crab, and lobster (new season started). **Crabmeat** (Blue & Red, pasteurized) is higher on supply constraints and tariff challenges — many suppliers controlling inventory by not bringing on new customers. Cod faces supply challenges, specifically Atlantic, due to quota reductions. Canadian snow crab 5–8 oz clusters out of Newfoundland trending lower.

**Fuel:** Regular gasoline averaged \$4.500/gal (+\$0.048 WoW, +\$1.380 YoY). On-highway diesel averaged \$5.639/gal (flat WoW, +\$2.163 YoY). Fuel surcharges continue to flow through freight rates.

**Grain & Oils:** Wheat softening from earlier rally; winter wheat at 28% good/excellent (-3% WoW). Spring wheat planting 53% complete. Soybean oil supported by crude-oil strength and EPARVO mandates at 8.86B RINs (2026) and 8.95B RINs (2027), well above expectations. Palm oil April production up 18% MoM with stocks +24% YoY.

**Sugar:** 2025/26 U.S. production projected at 9.268M STRV (-1.4% YoY); ending stocks projected down 24.5% with stocks-to-use ratio of 15.17%. Beet sugar pricing \$38–\$42; cane \$45–\$50. High-tier imports continue to shift market dynamics.

**Cocoa:** Futures edged higher over the past month, peaking near \$3,700/MT. Cocoa powder steady but at a premium to butter and liquor; producer inventories low and lead times extended into Q3. Early signs of a modest uptick in powder pricing.



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