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Weekly Market Review
May 29, 2026

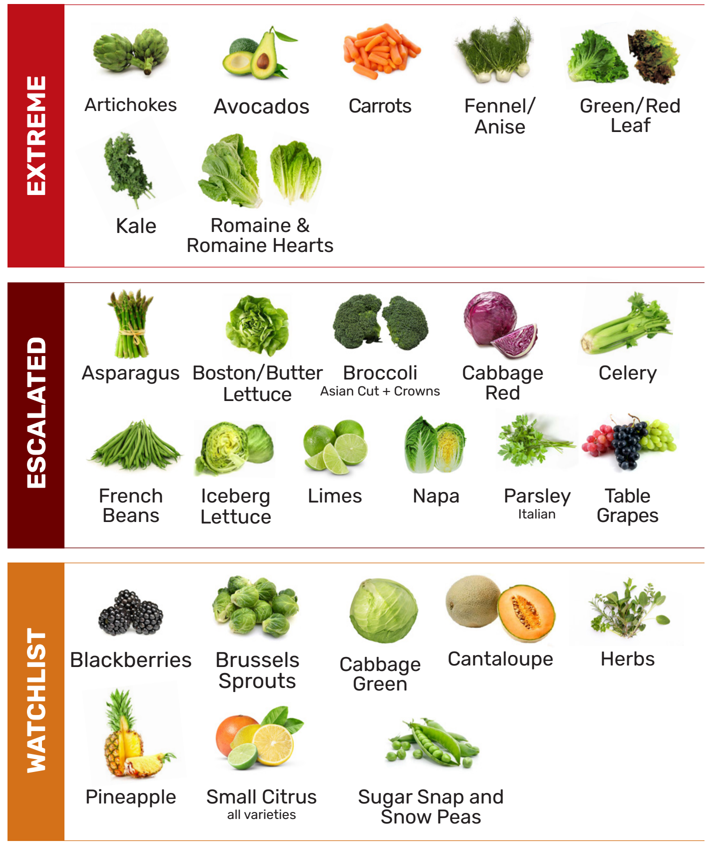
Overview

CRITICAL: AVOCADOS

Mexico end-of-season tightened faster than expected: fewer active orchards, growers slowing harvest in anticipation of late-season pricing, and the industry harvested too aggressively earlier in the year. Field prices have escalated sharply over the past three weeks. California is now at 17M lbs/wk (dry matter 27%); Colombian fruit is trickling in; Mexican Flora Loca has been approved to start early. Some suppliers have declared Force Majeure and will return to contract pricing once the market stabilizes. The upcoming LOCA bloom is projected to be 8–10% lighter, so June and July are expected to remain particularly challenging, with broader relief not expected until the new Aventajada crop in mid-September. Please support occasional size substitutions to protect program continuity.

PROMOTABLE: BLUEBERRIES

Strong supply from California's Central Valley peak, Central Mexico, North Carolina, and Georgia — with Oregon and Washington starting next week. Push blueberries on menus while availability is strong.



Markets continue to improve as **Tomato** production increases out of Mexico. Florida and the East Coast are ramping with daily improvements expected on all items. Recent Southern rain is slowing production and keeping pricing elevated — expected to subside as more regions come online.

The **Lime** market will ease as more volume crosses with peak sizing on small fruit; 175's and larger remain short.

Squash and **Bell Pepper** remain active.

The market remains volatile and Salinas is currently experiencing rain, which will affect harvesting and contribute to disease pressure. **Artichokes, Brussels Sprouts, Celery, Romaine, Red Leaf** and **Green Leaf** have extremely limited supplies. Romaine and Green Leaf coverage will be a large factor through next week. **Carrots** still slightly limited but improving — full relief in two weeks. Brussels Sprouts limited until July. Iceberg has improved (down significantly in CA markets) but growers are holding to 6-week averages.

Import **Cantaloupe** and **Honeydew** are done — all production has shifted to Arizona. With Arizona starting early on warmer temps, some suppliers are concerned they will finish early and possibly gap before California is ready. Current supplies are good on both. **Pineapple** availability remains tight — size flexibility recommended.

Berry markets are expected to remain mostly stable as California production builds across multiple categories while Mexico stays supportive. **Strawberries** are weather-sensitive after mid-week rain in Watsonville/Salinas; FOBs in the high teens. **Raspberries** stable; **Blackberries** well-supplied with light demand. **Blueberries** are the most promotable berry right now.

Citrus: Tight on smaller sizes across Lemons, Navels, Cara-Caras, and Blood Oranges. **Lemons** may have averages in place as districts transition — give ample lead time. **Cara-Caras** are finished for the season. **Domestic Meyer Lemons** are coming to an end; imports begin in June. **California Valencias** are beginning small with some suppliers noting upcoming supply challenges. Mandarins finishing up — imports coming in.

FRUITS & VEGETABLES

Avocados: **EXTREME** As we near the end of the Mexican main crop, remaining growers are strategically slowing harvest in anticipation of stronger late-season pricing — field prices have escalated rapidly over the past three weeks. The industry, ourselves included, harvested aggressively earlier in the year to protect orchard health, and remaining supply has tightened faster than projected. California has increased to 17M lbs/week (dry matter 27%); Colombian fruit is trickling in; the market will need Peru to come in strong in mid-June. Mexico's Flora Loca has been approved to start early; however, the LOCA bloom is projected to be 8–10% lighter year-over-year. June and July are expected to be particularly challenging, with broader relief not anticipated until the new Aventajada crop in mid-September. Mexican dry matter remains 36%, normal for end of season.

Bananas: Supply will remain tight due to increased global demand and declining tropical production. Quality is very good; consistency will be crucial. Maintain regular ordering patterns.

Pineapples: **WATCHLIST** Market remains tight with strong demand. Contracts maintain integrity; size flexibility required for 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.

BERRIES

Strawberries: Markets remain firm due to colder weather and rainfall across all production areas. Harvest crews are slowing into the weekend for culling and cleanup following recent rain. A slight warming trend next week should help increase production in Salinas and Watsonville. Plants are gaining strength with good green-to-light-red fruit volume; seasonal temps should help output recover. Santa Maria production continues its seasonal decline — west-side quality remains strong, while many eastern fields have been diverted to processing or removed due to weather exposure. Overall quality remains good across regions with only occasional bruising, overripe fruit, and slightly smaller sizing; misshapen fruit has improved significantly.

Blackberries: **WATCHLIST** Steady production from California and Central Mexico. Mexican supplies remain at peak through the next two months — warmer temps slightly impacting berry size and firmness. Watsonville crop development progressing well; conventional harvest expected to begin around June 1, organic in early July. Demand remains light.

Blueberries: Strong supply from California (Central Valley peaking), Central Mexico, North Carolina, and Georgia, with Oregon and Washington starting next week. Quality is excellent with strong bloom, crisp texture, and good flavor; Mexico is seeing only minor heat-related defects.

Raspberries: Consistent production from California and Central Mexico with lighter demand. Mexico in peak volume with excellent color, firmness, and flavor across conventional and organic. Watsonville production remains in early-stage harvest with light volumes for the next two weeks before a more meaningful increase in early June.

CITRUS

Limes: **ESCALATED** Supply continues to improve but sizing issues persist out of Mexico and Central America — distribution skews heavy to 230 ct and 250s. Larger sizes such as 175's and larger remain extremely tight. Moderate quality pressure with oleocellosis. Markets expected to remain firm through Mid-June; long-term outlook is downward pressure on FOB. Sub to smaller sizes through Mid-June. Overall quality is expected to decline due to weather-related pressure.
Lemons: 140/165/200's are tightening. Some suppliers will not take new volume on smaller sizes until supplies improve. Averages are also in place.

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. Some suppliers report upcoming supply challenges this season.

Mandarins: Mandarins are finishing up — imports coming in. Stay in contact with your supplier on other varieties or imports.

Cara-Cara & Bloods: Still peaking large. Tight on smaller sizes. Cara-Caras are finished for the season.

Grapefruit: California Grapefruit available!

Domestic Meyer Lemons: Coming to an end; imports begin in June.

WEST COAST LETTUCE

Iceberg: ESCALATED Quality is good and supplies are still limited with some growers but are improving. Weights will be light. Shortened shelf-life issues should be expected. Growers are holding to averages.

Iceberg VA: ESCALATED Quality is good and supplies are light but improving. Reports of short shelf life, insect pressure and mildew in bags. Growers are holding to averages.

Romaine & Romaine Hearts: EXTREME See critical alert on cover. Quality is fair, but supplies remain 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. Romaine supplies look to remain limited for the next few weeks.

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: ESCALATED 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 and Coachella this week; Mexico is about done with limited volume crossing through McAllen; Nogales wrapping up for the season. Quality is good across 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 week. Quality remains good.

Mixed Chili Pepper: Supplies stable on most varieties — decent crossings from Mexico; Coachella and South Georgia ramping. Markets will be shorter this week on Fresnos and Poblanos.

Tomatillo: Good supply and quality available this week.

Pickles: Lighter supply available out of Central Florida and Nogales. Quality is mixed. South Georgia should start over the next 7–10 days.

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 done for the season — transitioned to South Georgia. Mexico is still harvesting a few beans but wrapping up soon. California supply is steady. Quality is good.

French Beans: ESCALATED Supply of both organic and conventional French beans out of Guatemala is good and continuing to improve. Conventional French bean availability out of Mexico remains fair.

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.

MELONS

Watermelon: The market has plenty of supply and is gearing up for the big 4th of July pull. All U.S. growing regions are experiencing good quality, and pricing has dropped ahead of the holiday.

Cantaloupe: WATCHLIST Sizing in Arizona has shifted from 9 ct to 12 ct; suppliers expect the profile to improve next week. We will continue to monitor the spring Arizona crop and whether they have enough product to make it until July.

Honeydew: Sizing on Honeydew has also shifted — growers are getting more 8 ct and less 5 ct. Some external scarring due to high winds, but overall quality is good.

HERBS

WATCHLIST Basil supply and quality continue to improve. Supplies remain steady with fair quality across most other herb varieties, with the exception of savory and lemon thyme.

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

MIXED VEGETABLES

Artichokes: **EXTREME** Quality and supplies are good, but supplies are light – driving the market.

Asparagus: **ESCALATED** Mexican production out of Baja continues to improve; Washington maintains strong volume levels. Peruvian production remains steady; Michigan and Canadian production continue to build. Markets have become less active overall as multiple growing regions are now producing at good volumes.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: **ESCALATED** Quality is good and supplies have improved. Reports of browning and pin rot continue. Crowns still escalated but the market is trending down.

Broccolini and Sweet Baby Broccoli: Quality is good, but supplies are still limited with some growers.

Brussels Sprouts: **WATCHLIST** Quality is fair and supplies are limited. Growers still combating insect pressure and internal browning; warming Mexico weather causing quality issues and reduced yields. Growers are holding to strict 10-week averages and expect the market to tighten further. Supplies will be limited until July, market is rising.

Carrots: (JUMBOS, MEDIUMS and CELLOS) **EXTREME** Supplies remain tight on Baby Carrots, Cellos, and Jumbos. Rainbow Carrots steady. Relief is on the horizon – availability limited for just a few more weeks. Growers request orders 7–10 days ahead of time.

Cauliflower: Quality is good and supplies have improved.

Celery: **ESCALATED** Quality is just okay and supplies are limited. Disease pressure and increased demand contributing to higher pricing. Growers are holding to averages but supplies are improving

Corn, Sweet: Steady supply out of South Florida and South Georgia; West Coachella done and Brentwood ramping up. Quality is good.

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

Kale: **EXTREME** Supplies are limited; 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 expected to be steady for the next several weeks; quality is good. Expect cost increases over the coming months – the USDOC ruled that Canadian growers received unfair subsidies and duties of 1.62–4.97% will apply once the ruling is formally published, putting upward pressure on both Canadian imports and domestic mushroom pricing.

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: **ESCALATED** 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 peas and sugar snaps steady. Mexican snow pea stable; sugar snap availability currently fair.

ONIONS:

California and New Mexico have started and supplies are stable, but pricing remains elevated. Production in Central California has started slowly but will ramp up in the coming weeks. Overall, quality has been good in both areas.

POTATOES:

Some movement as we head into summer. Suppliers seeing a shift toward smaller count sizes 70–120 ct while 40–60 ct have become tighter. Inventories being watched closely to last until new crop.

SWEET POTATOES:

Market has tightened as the industry moves into the final stretch of the 2025 storage crop. Limited supplies nation-wide, particularly on premium U.S. No. 1 grades and larger counts. Retail and foodservice demand remains steady to strong. North Carolina and Mississippi reporting lighter yields and tighter availability from weather challenges last season. New crop harvest expected in limited volumes in August, with broader availability in September.

TOMATOES: MEXICO

Round Tomatoes: Supply firm 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.

Roma Tomatoes: 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.

TOMATOES: CALIFORNIA

Expected to start the first week of June.

TOMATOES: EAST COAST

Round Tomatoes: Volume will begin to decrease over the coming weeks as growers prepare for the next transition. We expect to be into South Georgia and South Carolina the first week of June. Continued consistency of supply and much better quality on the horizon.

Roma Tomatoes: ESCALATED Steady supply and good quality expected over the next ten days as growers break new fields in Central Florida. Volume will decline as growers prepare for transition. Expect to be into South Georgia and South Carolina the first week of June.

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

OTHER FRUIT:

Apples: Washington apple market supplies are significantly tighter than expected coming into the season. Washington State Assoc. apple crop projections show an additional decrease of 5 million boxes from earlier season projections — a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, making the 100–175 count sizes that foodservice relies on much tighter than originally projected. Favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage grading into Premium and WAXF #1 for export programs or committed into retail bag programs. Pack-out percentages are down due to quality issues that only became evident once fruit moved into storage. Red Delicious, Gala, Fuji, Gold and Granny are all below historical supplies as growers replace those trees with newer varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

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 35–55 ct sizes and should remain for another month, with new crop Starkrimson pears expected mid-August. Both Bartlett and Bosc pears are currently gapping until mid-August and early September.

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.
Pomegranate: Limited supply out of Israel.

DAIRY:

Despite U.S. NFDM at $2.27/lb, Fonterra's benchmark SMP struggled to hit $1.64 on GDT. U.S./EU/SGX skim futures have all fallen after the GDT event — bulls look more nervous. April NZ/AU milk production was stronger than forecast; Argentina was weaker than expected. Volatile feed and cattle markets remind us outside markets could throw a surprise at any time.

SHELL EGGS:

National FOB shell egg weighted average prices are mixed with only caged Extra Large and Large well tested. Undertone steady to weak (softer vs. prior week). Retail demand light to at times fairly good; loose egg movement light to moderate. Offerings moderate to light; supplies remain moderate to fully adequate. Market activity moderate to slow. California weighted average delivered prices are mixed on light test; undertone steady to weak. Source: USDA Livestock, Poultry & Grain Market News (May 28,2026).

PROTEIN:

Beef: Harvest came in at 528k head last week (–48k YoY). Cash cattle traded at $260.73 (vs $262.85 prior). Packer margins remain deeply negative at –$323/head. Choice cutout finished at $390 (+$1) while Select declined $4.25. Momentum toward $400/cwt appears to be slowing — concern that elevated price levels may be weighing on beef demand. End cuts (round cuts) heading to grinders as lean trim remains at record levels; middle meats steady. Cattle on Feed May 1 inventories up 1.8% YoY — the first increase in 18 months, driven by April placements tied to drought and slower slaughter. Cargill Ft. Morgan plant lockout: 1,700 workers locked out over wage dispute — ~4,500 head/day capacity; cattle being redirected, production impact expected to be minimal. China commitments to buy more U.S. beef but high prices will limit near-term volume.

Chicken: WOGS of all sizes trending steady. Supplies moderate to active; floor stocks sufficient. Breast and front halves trending steady; jumbo b/s breast supplies at least adequate. Tenders, dark meat cuts, wings of all sizes — all steady. Chunk and trim uneventful. Leg quarters and drumsticks steady. Export market prices steady.

Pork: Harvest 2.321M head, continuing seasonal decline. Cutout fell $1.30/cwt on continued weakness in hams and bellies. Pork production +0.2% YoY at 507M lbs. This week: steady to higher across primals on shortened kill. Butts, ribs, and loins continue solid retail demand on strong value proposition vs beef — called steady to higher through June. Hams and bellies mostly steady, tied to foodservice and moderate export interest. Primal direction: Butts, Loins, Ribs trending up; Ham, Belly, Trim 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, V-type wings steady to weak. Thigh meat steady. MST market steady to weak; export trading very slow with light demand.

OTHER COMMODITIES:

Seafood: Pricing broadly steady week-over-week across shrimp (domestic and imported), tilapia, pangasius, scallops, swordfish, king crab, tuna, and lobster meat. Fresh Chilean salmon moved higher this week — market unsettled but firm. Crabmeat (Blue & Red, pasteurized) remains higher on supply constraints and tariff challenges — many suppliers controlling inventory. Cod (Atlantic and Pacific) supply challenged by quota reductions. Haddock supply remains constrained following the Jan 1, 2026 prohibition on harvesting haddock from Russian waters. Canadian snow crab 5–8 oz and 10+ oz clusters out of Newfoundland trending lower as Gulf Zones quota fills (now >90%).

Fuel: Regular gasoline averaged $4.475/gal (–$0.015 WoW, +$1.315 YoY). On-highway diesel averaged $5.523/gal (–$0.073 WoW). Surcharges continue to flow through freight rates.

Grain & Oils: Wheat traded mostly lower this week following oil down as U.S. and Iran work toward an agreement. Winter wheat condition lost another point to 26% good/excellent — the second lowest winter crop rating in history. Spring wheat 86% planted (+13 WoW). Soybean futures +1.7%; SBO +0.6%; soybean meal –0.6%. Palm oil May 1–25 exports down 14.5–18% MoM. Canola planting delayed — Saskatchewan only 15% planted (slowest in 6 years).

Rice: South and California milled rice mostly steady; second heads, brewers and by-products steady.

Argentina export tax outlook: Argentine soybean export tax begins reducing 0.25%/month starting 2027 (24% down to 21% by end of '27), with further 0.5% reduction in '28 down to 15% — a structural shift for global oilseed flows.

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