Fresh Is Everything

Weekly Market Review
August 28, 2026

Overview

Tomato production continues to fluctuate in South Carolina, Tennessee, and Virginia due to heavy rain and markets went higher this week; Mexico's production of Rounds and Romas remains steady. We are finally starting to see some relief in the Snacking Tomato market, but we still expect some challenges over the next week. In California, Tomato production remains steady, but demand is much higher.

The **Lime** market will begin to see an uptick on price and volume declines; new crop will be significantly different, leaning heavily to smaller fruit; 175's and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks.

Hot Pepper production is expected to stabilize most varieties. **Zucchini/Yellow Squash** were both tight this week as well as **Slicer Cucumber**.

U.S. **Table Grape** supplies are steady this week, and quality is outstanding on the new crop out of California.

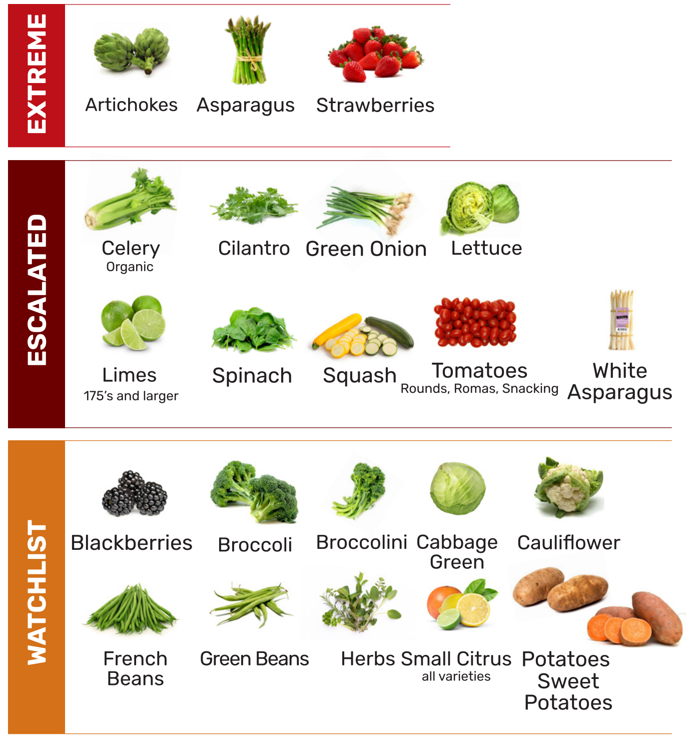
We will also start to see the impacts of the Canadian Tariffs on **Mushrooms** impact the industry over the coming weeks. In addition to these increases, we will also see increases across the domestic supply chain, which mostly impacts growing and operating costs.

Warm weather along with disease and insect pressure will continue to affect harvestable acreage. Growers anticipate these challenges will remain a significant factor impacting supplies throughout the Salinas season, with **Leafy Greens**, **Broccoli** and **Cauliflower** being the items most likely affected. **Artichokes, Cilantro, Green Onions, Spinach** and **Anise/Fennel** are limited in supplies due to ongoing supply constraints. For **Broccoli** and **Lettuce**, supplies continue to tighten, and the markets are escalating.

The **Avocado** market remains stable after another good week of volume from Mexico, California and Peru. The size curve out of Mexico has shifted and now favors 48ct. 60ct and smaller have come tighter and we have seen an increase in price. California and Peru production is slowly starting to taper off but we can expect volume from both into September.

Cantaloupe and **Honeydew** demand has increased as retailers are promoting both melons for the Labor Day holiday weekend. Pricing has moved up and we should expect to see slightly higher pricing moving forward. Production and quality remain strong.

Berry markets remain mixed as key growing regions move through seasonal production transitions, with near-term availability continuing to face pressure across several categories. Demand remains elevated while declining production in established regions and weatherrelated delays have limited overall supply, although developing regions are beginning to add volume. Quality remains generally favorable, with isolated condition challenges continuing during the transition.



Supply conditions are expected to gradually improve through September and into early October as fall production builds and additional domestic and import volume becomes available.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including **Lemons** and **Oranges**, with fruit generally trending larger. California Valencias are in full swing. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. **Grapefruit** supplies are a mixed bag with some suppliers anticipating a potential gap in supplies and others sitting comfortably. Be in close contact with your supplier on this matter.

El Nino: While it's still too early to predict how severe the impacts of El Nino will be, we do know that impactful storms will likely hit the Central Coast. We will be adding updates as we receive them but for now, all indicators are pointing towards a strong El Nino taking shape over the next several months. Yuma will likely see increased participation, so growers are planning to place crops across various growing regions to try and mitigate supplies issues. The growers do have plans in place and will be acting accordingly to try and minimize the effects of the weather event as much as they can.

FRUITS & VEGETABLES

Avocados: Mexico sent 49.4 million pounds to the U.S. last week, the average dry matter is 27%. California harvested 8.8 million pounds and has an average dry matter of 29%. Peru sent 6.4 million pounds with dry matter around 25%.

Table Grapes: Production is stable out of California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Autumn Ryals, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead and there may be supply issues on the back end of the season.

Bananas: Banana supply will be stable, but production curtailed due to 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. Bunker rates will be released this week and next, expect them to be higher due to rising fuel costs.

Pineapples: Supplies have started to tighten up, and we have seen an increase in open market pricing. Contract volume should hold firm, but open market availability has dropped. Suppliers are expecting this to last for 4 to 6 weeks. This should not affect quality, which has been good overall.

BERRIES

Strawberries: EXTREME Strawberry supplies remain tight as California continues through a challenging seasonal production transition following prolonged July heat and an earlier-than-normal start to the season. Watsonville and Salinas volumes continue to decline seasonally, while Santa Maria production is increasing week-over-week and is expected to see a more significant increase in the near term; however, demand continues to exceed available supply. Additional fruit diverted to processing, combined with stronger retail and foodservice demand as schools return to session, continues to place pressure on fresh-market availability. Quality is generally good, with cooler conditions helping improve firmness in Watsonville and Salinas, although some crooked fruit remains and isolated bruising and softness are being reported in Santa Maria. Market conditions should gradually improve as Santa Maria fall production builds and additional volume from Baja California begins contributing to overall supplies during September.

Blackberries: WATCHLIST Blackberry supplies remain limited as cooler weather has delayed production in Watsonville, reducing expected volumes through August and into mid-September. Recent weather has helped improve conventional volume, with good overall quality reported, while some quality challenges remain on organic fruit. Mexican availability is also expected to remain limited through August and September. Supplies should begin improving in late September, with more significant Mexican volume expected during October.

Blueberries: Blueberry supplies remain steady from the Pacific Northwest but are expected to decline over the coming weeks as the season winds down and fruit remaining in the fields becomes increasingly limited. Pacific Northwest availability is expected to remain limited during weeks 36 through 39, with quality currently reported as fair-to-good. Peruvian conventional arrivals have begun and overall supply is increasing, although availability will remain limited through August and September. Organic Peruvian volume remains light, with initial arrivals beginning late in week 35 and limited availability expected through September.

Raspberries: Raspberry supplies are expected to tighten as Watsonville production declines week-over-week for the remainder of the season. Mexican production is also declining through August but is anticipated to rebound during September, with export volume transitioning into Texas at the end of week 35. Quality remains favorable across both regions, with good color, firmness, and flavor reported from Mexico and excellent firmness, flavor, and appearance from Watsonville.

CITRUS

Limes: ESCALATED Supply will get lighter, and markets are firming up as current regional product will decline. We will continue to see size issues with distribution will skew heavily toward 175s and 250s. Unfortunately, this is leaving larger sizes. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next several weeks. Overall quality will be a concern; external blemishes, oleocellosis and limited shelf life may occur.

Lemons: Small lemons are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve.

Navels: Finishing up, some suppliers are completely finished with Navels.

Valencias: California Valencias have begun and are projected to have strained supplies on small sizes.

Mandarins: Mandarins are finishing up and imports are coming in. Be in contact with your supplier on other varieties or imports as alternative options.

Grapefruit: California Grapefruit available!

WEST COAST LETTUCE

Iceberg: WATCHLIST Lettuce quality and supplies are okay. There has been an increase of disease and insect pressure. We have seen some reports of internal burn, wind burn and soil related defects. The market is trending up. Supplies are becoming limited as demand increases. September will be challenging for lettuce. Cello Lettuce and Washed and Trimmed lettuce are currently triggered, and we expect the rest of the lettuce items to trigger next week.

Iceberg VA: Quality and supplies are okay.

Romaine VA: Quality is good and supplies are improving. We are still seeing more core in the bags and some mildew.

Boston/Butter Lettuce: Quality and supplies look good.

Romaine & Romaine Hearts: WATCHLIST Supplies and quality are okay. There have been reports of tip and fringe burn. This item remains on the watchlist and is expected to escalate soon. We are seeing high core, soil concerns, and insect pressure. Yields are being affected. Baby Romaine disease pressure has also increased, and supplies will be lighter as we go into September.

Green Leaf, Better Burger and Red Leaf: Quality and supplies are good.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Supply is steady outside of California. Lighter supply out of the East due to ongoing rain and quality issues, we are seeing upward pressure on market business.

Color Bell Pepper: Good supply is available out of Fillmore/Somis, Baja, and South Georgia this week however markets are expected to firm up a tad late next week. Quality is outstanding on open-field varieties. The Hothouse Pepper category is steady out of Canada and Mexico.

Jicama: Stable supply and good quality available.

Mini Sweet Pepper: Supply lighter this week; quality is good.

Mixed Chili Pepper: Supplies are stable on most varieties with steady volume crossing from Mainland Mexico, Baja and local programs in California, Mexico as well as the East Coast. Red Fresnos seem to be the shortest, and we see much higher prices per pound than normal.

Tomatillo: Good supply and quality available this week.

Pickles: Lighter supply available out of South Georgia, Florida, and Mexico. Quality is good.

Eggplant: Central Valley volume is steady while local programs in the East (Tennessee, North Carolina and Michigan) were limited this week. Overall quality is good.

English Cucumbers: Lighter supply and higher demand are pushing FOB prices upward out of Canada and Mexico. Quality is good.

Slicer Cucumbers: Supply crossing through Otay Mesa and McAllen will tighten up as heat has advanced those crops. In the East, we are seeing good supply out of Tennessee and Michigan. Quality is good from all shipping points. Expect to see some volatile markets and higher prices over the next 2-3 weeks.

Green Beans, Round Type: New York and other local regions in the East seem to be in good production this week. In the West, Orange County and Baja supplies are limited. Quality is mixed by region. Pole beans, Kentucky Wonders and Half Runners are much higher.

French Beans: WATCHLIST French bean supplies are improving, with both organic and conventional production increasing out of Guatemala. Conventional supplies from Mexico also remain strong, supporting favorable overall availability.

Zucchini/Yellow Squash: ESCALATED Very tight supply and higher demand have pushed pricing higher this week on Green and Yellow Squash out of Michigan, Virginia and California. We expect to see volatility in these markets over the next 2-3 weeks minimum and should see some price relief as growers break early fall blocks and production increases. Quality is good.

ONIONS:

The transition to the NW, Washington, Oregon, and Idaho has begun. Most California suppliers are finished for the summer season. Overall, the market is still struggling to keep up with demand, keeping open market pricing elevated. As we get more production from the Northwest, the market will begin to stabilize.

POTATOES:

WATCHLIST Old crop potatoes are almost finished, and most growers have begun harvesting the new crop. Overall acreage is down approximately 5%, while limited water availability and extended periods of high nighttime temperatures have put additional pressure on the crop. The early outlook indicates that larger 40–70 count potatoes will remain limited throughout the season, while smaller 80–120 count potatoes are expected to have good availability. Current market pricing remains elevated, but as more new crop potatoes become available, we anticipate pricing to gradually decrease.

SWEET POTATOES:

WATCHLIST Growers have started to harvest the new crop and will put them in storage to let the skin set before shipping. This will take 3-4 weeks before we start to see the new crop shipped out. Limited old crop supplies remain available nationwide, putting a premium on all sizes. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market. Quality has been fair to poor as we finish up the old crop.

HERBS

WATCHLIST Basil production, quality, and supply remain good across both regions. On the East Coast, all herbs, including imported chervil, are readily available. On the West Coast, most herbs have steady supplies and fair quality, although chervil, lemon thyme, and marjoram remain limited due to heat.

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	Steady	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	Steady	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 remains stable with most of the volume coming out of the Midwest. California is still producing some volume along with Mexico. Pricing is steady as suppliers get ready for one last holiday push. Quality throughout the growing regions has been good.

Cantaloupe: Production remains strong as suppliers see high brix levels 14-16%, and vibrant color fruit. Fields are currently producing more 9s followed by 12s, while 15s are limited.

Honeydew: Sizing still favors 5s, 6s are limited, and 8s are hard to find. Suppliers are asking for flexibility on sizing. Overall, the quality remains strong with high brix levels between 13-15%.

MIXED VEGETABLES

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated.

Asparagus: EXTREME The asparagus market remains extremely active, with demand continuing to exceed available supply and prorates expected to remain in place through next week. Older fields in Peru are winding down, while new fields in Southern Peru (Ica) are beginning to open; however, elevated temperatures associated with strong El Niño conditions have limited the anticipated increase in production. The warmer weather is also contributing to smaller sizing and increased quality challenges, including spreading and feathered tips. Mexican production remains very light, although some additional volume is being brought in to help offset the current shortages from Peru. Larger sizes are expected to remain particularly limited until production from Ica and Southern Baja begins to increase. Assuming rainfall does not significantly impact the Baja growing regions, some improvement could begin within the next several weeks, with broader supply conditions expected to normalize from late-September into early October.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality is good, but supplies are tightening up. Reports of browning and pin rot continue. Organic broccoli remains at the extreme level. With insect pressure increasing, we expect supplies to become very limited. The market is rising.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality is good, but supplies are limited.

Brussels Sprouts: Quality and supplies have improved.

Carrots: (JUMBOS, MEDIUMS and CELLOS) Quality and supplies are good.

Cauliflower: WATCHLIST QCauliflower supplies are expected to remain very challenging as we move through the remainder of the season. Some suppliers are gapping until the end of next week, leaving a significant gap in production. Diamondback Moth pressure also continues to severely impact yields, particularly in South County, with Santa Maria also experiencing heavy pressure. The continued warm weather is only adding to the challenges in the fields. At this point, growers are not seeing any meaningful improvement, and we expect cauliflower supplies to remain tight and the market to stay difficult for the foreseeable future.

Celery: Quality and supplies are okay. Disease pressure, black heart, remains a factor and is affecting harvestable acres. Organic Celery is still at the extreme level. With school returning, demand is expected to increase, and the market will strengthen as we go into the fall.

Corn, Sweet: We are seeing improving supply out of the Northeast and Central Atlantic push prices down going into late August in preparation for Labor Day Promotions. In the west supply seems stable out of Oregon, California and Washington on Bi-Color and White; Yellow seems to be the shortest in the west. Quality is good out of all regions.

Fennel: Quality and supplies have improved.

Kale: Quality and supplies look good.

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 is good, but supplies are now very limited. Growers will be holding to strict averages. MX has had extremely high temperatures. Yields are being affected.

Mushrooms: Promotional volume is available for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years, Canadian mushroom farmers received unfair subsidies, giving them a clear advantage over the domestic mushroom farming industry. The USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62–4.97%. These duties will be applied once the ruling is formally published. This will not only increase the price of imported mushrooms from Canada but will also put upward pressure on the price of domestically grown product as well. This is something domestic growers have been seeking some time to support increases in their operating costs over the past five years. We are also expecting to see domestic suppliers implement cost of living increases as the dust settles on the DOC rulings to compensate for increased growing costs, food safety, labor etc. Brought on by years of dumping practices out of Canada.

Napa Cabbage: Quality and supplies have improved.

Parsley (Curly, Italian): Quality and supplies 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: Quality looks good, but supplies are light.

Spinach: ESCALATED Supplies and quality look good but we are seeing rapid growth from the warmer weather which is resulting in larger leaf sizing and weaker texture. Insect activity has also increased.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: Snow pea supplies are improving from Guatemala, while West Coast domestic production remains limited. Sugar snap pea availability remains extremely tight from Guatemala, although demand and market activity remain relatively low. Domestic sugar snap supplies are fair, providing some support to overall availability. Despite the currently subdued market, pricing on sugar snap peas is expected to increase as limited supplies continue.

TOMATOES: MEXICO

Round Tomatoes: ESCALATED Supply will remain snug on larger-sized fruit this week. Quality is outstanding on what is crossing this week.

Roma Tomatoes: ESCALATED Excellent supply and quality available out of Jalisco and Baja.

Grape Medley, Grape and Cherry Tomatoes: ESCALATED Grape Tomatoes and Cherries are very short this week due to lighter harvesting and higher demand. Medleys seem to be readily available. Quality on what is crossing the border has been good across all varieties.

TOMATOES: CALIFORNIA

Supply was lighter this week on rounds, especially larger fruit. Prices were higher this week as demand from the east was higher. Quality is very nice out of California currently on mature greens and vine ripes.

TOMATOES: EAST COAST

Round Tomatoes: ESCALATED Volume remains light this week out of Tennessee and North Carolina, mostly due to rain delays. Quality is mixed out of all regions. Small fruit is short, possibly requiring size substitutions.

Roma Tomatoes: Supply is steady, and quality is fair at best due to weather-related pressure.

Snacking, Grape Medley, Grape and Cherry Tomatoes: ESCALATED Lighter volume this week on Grapes, Grape Medley, and Cherries due to transition and higher holiday demand. Markets are expected to remain active. Quality is fair at best.

OTHER FRUIT:

Apples: Washington Apple inventories continue to trend below both last year and historical averages across many key varieties, supporting the firm pricing environment that has developed throughout 2026. New crop Gala apples are being harvested, and inventory is building up. Granny Smiths are limited as they finish up storage crop, new crop will start in 3 weeks. Red Delicious, Fuji and Gold Delicious all have very limited storage supplies left, and new crop will start in mid to late September. New crop Honeycrisp apples have started, and good volume is available.

Pears: D'Anjou availability is tight and primarily limited to U.S. #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 U.S. #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 Mexico.

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

Cherries: Lighter supply out of Washington State, New York and Canada.

Stone Fruit: Steady supply out of California and other local regions.

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: Steady supply out of Mexico, Peru and Puerto Rico. Varieties: Tommy's, Ataulfo, Keitts and Haden.

Kiwi Fruit: Supplies are fair out of Chile.

Quince: Limited supply available this week.

Figs: Black Mission and Brown Turkey available out of California.

DAIRY:

The price strength from last week flowed through to this week, at least for everything other than U.S. cheese and butter. I think we're dealing with good (to great) global demand combined with fears about future supply. Milk production across the major exporters is slowing, but still growing (with NZ showing some very strong growth), but feed costs are shifting higher and hot/dry weather has taken a toll on animals and crops in the Northern Hemisphere. There is a chance this rally gets too far ahead of the actual supply and demand balance and pulls back at some point, but it is hard to be bearish medium-long term when production growth is slowing and demand has been amazingly good.

SHELL EGGS:

National FOB shell egg weighted average prices are steady to lower. The undertone is weak for the larger sized eggs. Retail demand is moderate to at times light. Loose egg movement is light. Offerings are moderate to instances light with remaining Mediums in the tightest position. Supplies are moderate to fully adequate. Market activity is slow to moderate. California weighted average delivered prices are lightly tested. The undertone is steady to weak with the larger sizes in the weakest position. Demand into retail channels is light to moderate, while light for food service. Distributive buying interest is very light. Offerings are moderate to light. Supplies are moderate. Market activity is slow.

PROTEIN:

Beef: Positive $132/head margins were implied based on cattle costs and corresponding boxed beef values. Fed cattle prices declined $2.28/cwt during the week, finishing with an average price of $225.44/cwt. Both the Choice and Select cutouts advanced more than $10/cwt, supported by strength across nearly all primals, with Choice loins serving as the lone exception.

Chicken: WOGs are about steady. Sizes 3 to 3.5lbs are testing for support. Floor stocks are adequate. Supplies are moderate. Demand is moderate. Bone-in breasts, front halves are steady. Tenders activity is good. Demand is moderate. Wings market tone is fair. Dark meats are holding at full steady. The market is steady.

Export markets are moderate.

Turkey: Frozen 8-16 lb. hens and 16-24 lb. toms steady. Demand light. Offerings light. Frozen commodity Grade A 8-16 lb. hens offered at 176-190 and 16-24 lb. toms at 178-190 cents FOB for current shipments.

The market on white meat and white trim is steady to weak. Demand is light. Offerings of fresh white meat are light. Frozen white meat and white trim offerings remain light. Cooked and deli demand light. Grade A consumer sized breasts, institutional sized breasts are steady. Tom drums, full-cut ,and V-type wings are steady to weak with the balance of bulk parts mostly steady. Demand light to instances moderate. Offerings short to light. The thigh meat market is steady. Demand light. Offerings very light to light. Defatted gizzards, hearts and livers steady to barely steady. Demand and offerings light. Tails steady. Demand and offerings light. Tom necks weak with demand very light.

Mechanically separated turkey (MST) market is weak. Demand is light for both fresh and frozen. Offerings light to moderate with fresh the most available. Trading slow..

EXPORT MARKET HIGHLIGHTS
Trading slow. Market steady to weak. Demand light.
Offerings light to moderate.

Pork: Belly availability continues to increase, putting downward pressure on pricing as seasonal bacon demand begins to fade. In contrast, butts are seeing renewed buyer interest and have been one of the stronger primals in recent trade. Loins are generally called steady this week, while rib values are beginning to soften in line with normal seasonal trends following the summer grilling season. Cash hog prices moved lower on Tuesday. Beyond product fundamentals, market participants are closely monitoring the ongoing trade dispute between the U.S. and Canada. The two countries maintain an integrated pork supply chain, with the U.S. importing both feeder pigs and market hogs from Canada while also exporting significant volumes of pork north of the border. If trade tensions escalate further and disrupt normal product flows, the pork complex could face additional volatility in both supply and demand channels.