

Fresh News



Market Alert

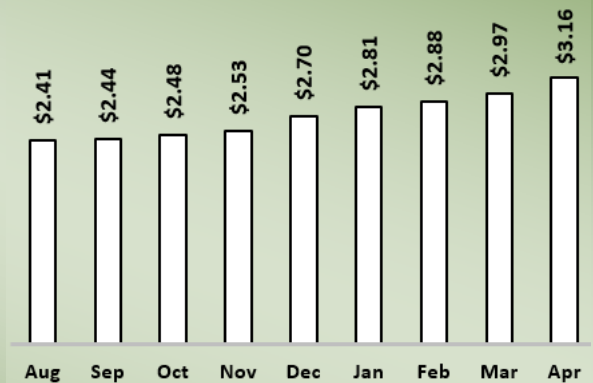
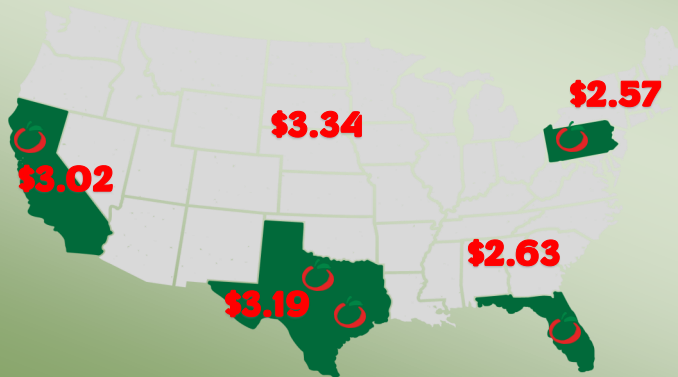
- Asparagus
- Bell Peppers
- Carrots
- Cucumbers
- Eggplant
- Limes
- Oranges
- Pineapple
- Tomatoes
- Watermelon

Market Overview

The North American produce market is currently experiencing broad-based supply constraints driven by a convergence of adverse weather events, seasonal transitions, and logistical pressures. Freeze damage in Florida, heat stress in California and Mexico, and transitional production gaps are simultaneously impacting multiple commodity groups.

National Reefer Rate per Mile (Last Week per DAT)

Trend



Weather Alerts

Location	Current Weather	Current Temp	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
YUMA WEATHER	clear sky	91°F	93°F / 55°F	93°F / 66°F	95°F / 63°F	95°F / 63°F	90°F / 64°F	88°F / 66°F	73°F / 63°F
HOMESTEAD WEATHER	few clouds	79°F	82°F / 73°F	84°F / 72°F	81°F / 70°F	79°F / 68°F	81°F / 70°F	82°F / 73°F	79°F / 70°F
CULIACÁN WEATHER	clear sky	93°F	97°F / 68°F	100°F / 66°F	97°F / 70°F	97°F / 68°F	100°F / 66°F	95°F / 70°F	102°F / 68°F
SONORA WEATHER	few clouds	93°F	93°F / 68°F	93°F / 72°F	90°F / 70°F	91°F / 70°F	90°F / 68°F	88°F / 70°F	88°F / 66°F
MCALLEN WEATHER	light rain	55°F	72°F / 55°F	66°F / 54°F	81°F / 59°F	86°F / 66°F	82°F / 72°F	84°F / 70°F	86°F / 73°F

Tomatoes

ALERT



Domestic

U.S. tomato production—primarily centered in Florida—is currently operating under severe supply constraints, driven by compounding weather-related disruptions and transitional growing conditions. Florida continues to recover from late-January freeze events, which have had a prolonged impact on crop performance. Fields now being harvested are producing reduced yields, smaller fruit sizes, and elevated grade-outs, particularly impacting Roma and round tomato categories. Additionally, broader industry reporting confirms that Florida volumes remain light across all tomato varieties, contributing to a nationwide tightening of supply. Quality challenges are widespread across U.S. production. Freeze-damaged crops are exhibiting: Increased defects and grade-outs, smaller sizing profiles, reduced shelf life and consistency. The U.S. tomato market is currently classified at EXTREME levels, with both Florida and Mexico supply disruptions compounding pressure. Availability is very limited, pricing is elevated and firm, and fill rates are challenging with increased risk of prorates. Relief from Florida is not expected for another 3–4 weeks.

Mexico

Mexican tomato production is currently facing notable supply constraints as the industry moves through a critical seasonal transition, compounded by environmental stress, declining yields, and operational challenges. The primary winter growing region of Sinaloa is winding down earlier than normal, with production impacted by plant fatigue, disease pressure, and prior adverse weather. As fields age and yields decline, overall availability has tightened, particularly across Roma and round tomato categories. While production is beginning to shift into Sonora, volumes have not yet ramped up sufficiently to offset the decline in Sinaloa, resulting in a temporary supply gap. Additional transition into Baja is expected in the coming weeks, followed by Central Mexico later in the season; however, these regions are not yet contributing enough volume to stabilize the market. Elevated temperatures in key growing areas have further reduced yields and affected fruit development, contributing to lighter crossings and inconsistent supply. Quality across Mexican tomatoes remains variable, largely dependent on region and harvest timing. Older fields are producing fruit with increased defects and inconsistent pack-outs due to disease pressure and environmental stress, while newer production areas are still developing and lack consistency. As a result, overall quality ranges from fair to good, with noticeable variability across shipments. Market conditions remain firm as supply limitations persist. Although product continues to cross into the U.S., inconsistent yields and pack-outs are limiting reliable availability. Pricing remains elevated, supported by steady demand and constrained supply, while logistical challenges—including anticipated labor slow-downs and border delays tied to seasonal holidays—are expected to further pressure movement in the near term.



A Fresh Take on Value-Added Distribution

Fruits

Apples

The apple market is currently characterized by a structural imbalance in size distribution, driven primarily by prior growing season heat events in Washington State. Elevated temperatures necessitated increased irrigation, which preserved fruit quality but resulted in a crop skewed heavily toward medium and large sizes. Consequently, smaller counts, particularly 125 and 138 sizes, are in critically short supply across major varieties such as Gala, Fuji, Granny Smith, and Honeycrisp. This imbalance is placing sustained upward pressure on pricing, especially within retail bag programs that rely on smaller fruit. Demand remains steady, and buyers are increasingly required to demonstrate flexibility in varietal substitution or size specifications. These conditions are expected to persist through the remainder of the storage crop season and into early transition periods.



heavily on disciplined procurement strategies and consistent ordering patterns. The category remains one of the more stable within produce, but forward-looking indicators suggest potential volatility later in the year.

Blackberries

Blackberry supply is currently constrained as Central Mexico moves past peak production. Seasonal declines in yield have reduced overall availability, although quality remains generally acceptable. While some stabilization is expected as the market progresses into April, meaningful increases in volume will likely be delayed until later in the spring. The category remains moderately tight, with limited promotional opportunities in the near term.



Blueberries

Blueberry availability remains significantly restricted due to the conclusion of the Chilean import season and insufficient replacement volume from Peru and Mexico. Although Mexican production has shown incremental increases, overall supply remains below demand requirements. Domestic production from Florida and Georgia is slightly delayed, further exacerbating the tight market. Quality remains strong, but pack-outs are inconsistent due to recent environmental stress. Relief is anticipated toward late April as Georgia production begins to ramp up, though the market is expected to remain firm



Bananas

The Banana markets are presently stable with consistent supply and good quality; however, underlying global dynamics suggest tightening conditions ahead. Increased worldwide demand, coupled with disease pressure and declining yields in tropical growing regions, is expected to gradually reduce availability. While current inventories are sufficient to meet demand, maintaining supply continuity will depend



A Fresh Take on Value-Added Distribution

in the interim.

Raspberries



Raspberries are among the most supply-constrained commodities currently in the market. Production in Central Mexico is at seasonal lows, and Baja volumes have not yet scaled sufficiently to offset the deficit. Compounding these supply limitations are ongoing logistical and geopolitical disruptions in key growing regions, which have intermittently impacted harvest and distribution. As a result, prorates and order cancellations are common, and availability is highly inconsistent. Meaningful recovery is not expected until late April or early May, positioning raspberries as one of the most volatile categories in the current market environment.

Strawberries



Strawberry production is experiencing notable stress due to sustained high temperatures in California. These conditions have disrupted normal plant physiology, resulting in uneven ripening, increased incidence of soft fruit, reduced shelf life, and variability in coloration. While harvests continue, the percentage of marketable fruit has declined, contributing to reduced effective supply. Central Mexico and Florida seasons have largely concluded, limiting alternative sourcing options. Although production is expected to improve as temperatures moderate, the market will remain sensitive in the near term, with continued quality concerns and supply fluctuations.

Grapefruit



Grapefruit supplies remain relatively stable compared to other citrus categories, with consistent production from both California and Texas. Quality is generally good, and availability is sufficient to meet demand. However, broader citrus market pressures, particularly size imbalances and strong demand for smaller fruit, may indirectly influence grapefruit pricing and movement patterns.

Lemons



The lemon market continues to reflect significant size stratification, with supply heavily concentrated in larger fruit. Smaller sizes, including 140, 165, and 200 counts, are increasingly difficult to source, resulting in firm to elevated pricing. Production is transitioning between growing districts, and while overall quality remains acceptable, the imbalance in size distribution is expected to persist into April. Buyers requiring smaller fruit must plan accordingly, as availability will remain limited.

Limes

ALERT



Limes are currently one of the most constrained commodities in the produce sector. Reduced production in Veracruz, Mexico—caused by prior weather events—has led to a sharp decline in available volume. The current crop is heavily skewed toward smaller sizes, with larger fruit commanding significant premiums. Quality is variable, with increased incidence of cosmetic and shelf-life issues. While supplemental supply from Colombia is

A Fresh Take on Value-Added Distribution

being explored, overall availability remains insufficient to meet demand. Elevated pricing and limited supply are expected to continue through April.

Oranges

ALERT



The orange market is dominated by a pronounced size imbalance similar to that seen in apples and lemons. California Navel production is heavily weighted toward larger fruit, with smaller sizes in extremely short supply. Environmental factors, including inconsistent sunlight and early-season weather variability, have contributed to this distribution. Although quality and sugar content remain strong, the inability to source smaller fruit consistently presents challenges for buyers. These conditions are expected to persist through the transition into Valencia production.

Grapes



Table grape supply is generally stable, with strong quality and favorable eating characteristics. Red varieties are well balanced, while green grapes are beginning to tighten due to increasing demand and limited availability of top-grade product. Overall, the market remains relatively stable compared to other fruit categories, though upward price pressure may develop for green varieties.

Cantaloupe



The supply situation remains stable overall, characterized by consistent availability and commendable quality perfor-

mance. The sizing trends persist in favor of larger fruit, whereas smaller sizes may still command a premium. The quality is robust, exhibiting a commendable internal condition and consistent eating characteristics.

Honeydew



There are indications that supplies are starting to enhance, with trends suggesting an increase in availability and a stabilization of pricing in the forthcoming weeks. This occurs after a phase characterized by significantly constrained supply, influenced by seasonal changes, weather-related interruptions, and quality issues throughout the agricultural areas of Central America.

Mango



Mango supply is currently in a transitional phase between production regions, resulting in some variability in both availability and quality. As Mexican production increases, the market is expected to stabilize. In the interim, buyers may encounter inconsistencies in sizing and ripeness.

Pineapple

ALERT



Pineapple markets remain tight despite slight improvements in availability. Strong demand continues to absorb available supply, requiring flexibility in size specifications to maintain consistent procurement. Quality remains good, and contracts are generally being honored, though spot market opportunities are limited.

A Fresh Take on Value-Added Distribution

Stonefruit

Stonefruit remains in a pre-seasonal phase with limited availability. Market activity is minimal, and conditions will improve as California production begins in the coming months.



Watermelon

Watermelon supply is constrained due to reduced offshore production and logistical challenges at border crossings. Mexican supply is currently the primary source, but yields are lower than typical. As a result, markets are elevated, and availability is limited. Conditions are expected to improve as domestic production begins.



Vegetables

Asparagus

ALERT

The asparagus market is under significant pressure due to declining production in Mexico, where elevated temperatures have reduced both yields and quality. While California production has begun, it remains insufficient to offset the shortfall. Demand, particularly ahead of Easter, continues to exceed supply, resulting in elevated pricing and inconsistent availability. Relief is expected as domestic production increases.



Bell Peppers

ALERT

Bell peppers are among the most supply-constrained vegetable categories. Florida production has been significantly impacted by freeze events, while Mexico continues to experience reduced yields and quality issues due to environmental stress and disease pressure. The combined effect has resulted in extremely limited availability, particularly for larger sizes and colored varieties. Markets are highly volatile and expected to remain elevated through mid-April.



Avocados

Avocado supply remains robust, supported by strong production from Mexico. Quality is excellent, with high dry matter content and favorable eating characteristics. Larger sizes dominate the market, while smaller fruit is more limited. Demand is strong, driven in part by retail promotions, contributing to stable but slightly firm pricing.



Broccoli

The availability of supplies is consistent, accompanied by enhancements in quality, while the demand continues to be robust. Salinas is currently in progress, whereas Yuma is concluding its activities. The overall availability is expected to maintain consistency as production in Salinas continues to rise.



A Fresh Take on Value-Added Distribution

Brussel Sprouts



The availability of supplies and the overall quality are consistently stable and showing signs of enhancement. Anticipate robust availability and advantageous pricing in the forthcoming weeks—optimal for promotional activities.

Cabbage



Cabbage markets are stable, with consistent supply and good quality from Yuma. Demand is steady, and pricing remains balanced. No significant disruptions are expected in the near term.

Carrots

ALERT



Carrot supply is gradually improving following earlier disruptions in Bakersfield production. However, size constraints remain an issue, particularly for larger formats. Warmer temperatures are supporting improved crop development, and availability is expected to continue strengthening over the next several weeks. Full recovery will take additional time.

Cauliflower



Current supplies of cauliflower are robust throughout all regions, with market conditions anticipated to moderate somewhat as the weekend approaches.

Celery



The production of Yuma has been completed, and it is anticipated that moderate supplies will be available this week from

Oxnard and Santa Maria. In summary, the market exhibits stability, with a comprehensive range of sizes accessible to satisfy demand. The quality in Southern California continues to be satisfactory, with only a few minor concerns regarding seeders.

Cucumber

ALERT



Cucumber supply is extremely tight due to a combination of seasonal transitions and reduced production in Mexico and Honduras. Florida production has begun but remains limited. Demand continues to exceed supply, resulting in elevated pricing and quality variability due to extended transit times. Market conditions are expected to improve gradually as Florida production ramps up.

Eggplant

ALERT



Eggplant supply is limited due to freeze damage in Florida, with reliance on Mexican imports to meet demand. Quality is generally better from Mexican sources, though availability remains constrained. Market conditions are expected to improve as domestic production resumes.

Garlic



Garlic markets remain stable with adequate supply and consistent quality. No significant disruptions are currently affecting the category.

Green Onions



Green onion supply is stable with acceptable quality. Markets remain balanced, with no major supply constraints reported.

A Fresh Take on Value-Added Distribution

Green Beans

Green bean supply is critically low due to weather-related damage in both Florida and Mexico. Production remains insufficient to meet demand, resulting in elevated pricing and frequent allocation. This category is expected to remain tight until new production begins in more northern growing regions.



Kale

Kale supply is steady with stable market conditions. Quality is generally good, though some minor issues related to heat stress have been observed.



Lettuce—Iceberg

The iceberg lettuce market is currently characterized by adequate supply levels; however, underlying production challenges are beginning to influence both quality and yield. While availability remains sufficient to meet current demand, carton weights are trending below seasonal norms due to environmental stressors in key growing regions, particularly Yuma and transitional California districts. Elevated temperatures, combined with insect pressure and mildew development, are contributing to lighter heads, increased trim requirements, and a reduction in overall field pack-out efficiency. In addition to weight variability, shelf life has become a growing concern, as field conditions are producing product with weaker structural integrity and increased susceptibility to breakdown during transit and storage. Reports of outer-leaf damage, cap leaf deterioration, and internal quality inconsistencies are becoming more frequent, necessitating closer



inspection at receiving points. As the industry transitions from desert production into coastal California growing regions, the iceberg market is expected to encounter additional tightening. Transitional gaps, coupled with already reduced yields, are likely to create periods of supply inconsistency. Consequently, the market is anticipated to shift toward a more active posture, with potential upward pricing pressure and continued variability in both quality and weights over the coming weeks.

Lettuce—Leaf

Supply Green and red leaf lettuce markets are currently maintaining relatively steady supply levels, supported by ongoing production in desert growing regions. However, quality challenges are becoming increasingly evident as crops mature under fluctuating environmental conditions. Insect pressure, mildew presence, and heat-related stress are contributing to outer-leaf degradation and internal inconsistencies, which are reducing usable yields despite stable overall volume. Although availability remains sufficient, these quality concerns are impacting product performance at the customer level, particularly in terms of shelf life and presentation. Carton weights are also trending lighter, reflecting the broader impact of environmental stress on plant development. As production transitions toward coastal California, the leaf lettuce market is expected to experience moderate tightening. The shift between regions often introduces variability in both supply and quality, and given the current condition of crops, this transition may result in increased market volatility. While severe shortages are not anticipated in the immediate term, buyers should prepare for incremental pricing



A Fresh Take on Value-Added Distribution

pressure and continued quality variability.

Lettuce—Tender Leaf



Tender leaf lettuce, including spring mix and specialty blends, continues to demonstrate relatively stable supply; however, it is increasingly affected by the same environmental pressures influencing the broader lettuce category. Due to its more delicate structure, tender leaf is particularly susceptible to mildew, fringe burn, and rapid deterioration under heat and moisture fluctuations. As a result, even minor field issues can significantly impact shelf life and usable yield. Current production is adequate to support demand, but quality consistency is becoming more variable, with increased reports of shorter shelf life and elevated shrink at the store and foodservice levels. These challenges are compounded by the precision required in harvesting and handling tender leaf products, where even slight deviations in growing or post-harvest conditions can affect overall performance. Looking ahead, the seasonal transition into California growing regions introduces additional uncertainty. While new production is expected to support supply continuity, the overlap between outgoing and incoming regions may lead to short-term inconsistencies in quality and availability. As such, the tender leaf market is expected to remain stable but sensitive, with a heightened need for quality management and flexible procurement strategies through the transition period.

Onions



Onion supply remains stable with balanced market conditions. No significant disrup-

tions are currently impacting availability or pricing. This one of the more stable items in the market.

Chili Peppers



Chili pepper markets are tightening across multiple varieties, including jalapeño, serrano, and habanero. Supply is constrained due to reduced yields and transitional production gaps. Markets are expected to remain firm in the near term.

Potatoes



Potato supply is stable with consistent demand and balanced market conditions. No significant issues are currently affecting the category.

Squash—Yellow & Zucchini



Squash production remains below seasonal norms due to cold weather impacts in Florida and limited supply from Mexico. Yellow squash is particularly constrained, while zucchini is somewhat more available. Quality is variable, and markets remain elevated, though gradual improvement is expected as new production comes online.



Your Texas *foodservice solution.*

A Fresh Take on Value—Added Distribution

Flowers—Every Day Program

- Fixed pricing programs
- Various price points focused on shopper demographics
- Customization capabilities



DiMare Fresh Locations



Dallas/Fort Worth
4629 Diplomacy Rd
Fort Worth, TX 76155
Tel. 817-608-0010



Houston
9221 Park South View
Houston, TX 77051
Tel. 713-688-0278



Scranton
301 Genet Street
Scranton, PA 18505
Tel. 570-342-3121



Tampa
8150 Eagle Palm Drive
Riverview, FL 33578
Tel. 813-671-8200

A Fresh Take on Value-Added Distribution