

PRO*ACT

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Crop Update

March 4, 2026

Seeing the Freeze Up Close

I spent last week in Orlando for SEPC, and it was nice connecting with many of you out there. While I was in Florida, I got a firsthand look at what the late January freeze did to crops in the region and the impact is more significant than the reports suggested.

Bell peppers took a serious hit. Fields that should be loaded are thin, and what's coming out is inconsistent. Strawberry plants looked structurally sound, but the ratio of flowers to fruit told the real story. There's more bloom than berry right now, which means volume is still weeks away.

That freeze is still echoing across the supply chain.

Bell peppers are tightening, particularly greens. Significant freeze losses in Florida have resulted in lower yields and more off-grade fruit expected this spring. Western Mexico volumes crossing through Nogales are rising and helping fill the gap, but prices are climbing as demand grows. Red bells are relying heavily on Mexico, where Culiacán is producing moderate volume with good quality and better yields ahead. Central Mexico crossings remain steady but limited, and Florida supply is minimal. Markets will stay firm short-term.

Tomatoes remain the headline. Southeast supplies are extremely limited after growers invoked Force Majeure due to crop loss. Domestic production won't recover until mid-April at the earliest. Mexico is helping cover the gap, but yields are lighter and quality at pack-out has been mixed. Recent logistics disruptions have stressed the supply chain. Rounds, romas, and grape tomatoes are all tight. Expect elevated pricing through the next six weeks, and consider substituting rounds for romas where possible.

Corn took a beating. Bi-color, white, and yellow corn in the Southeast are all impacted. On the West Coast, bi-color and white are limited, and yellow is extremely tight.



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Recovery isn't expected until new crop arrives in early April.

Green beans are in a similar spot. The freeze caused significant yield loss and irregular harvests in the Southeast. Mexico is providing relief out of Sinaloa, though cooler temperatures have slowed development. Guatemala is contributing modest volume with good quality, but lead times are longer. Expect firm markets through at least mid-March. Carrots are tightening as California transitions from the San Joaquin Valley to the Imperial Valley. Weather-related issues and reduced yields are limiting availability through March. Arizona and Georgia are helping fill gaps, but commodity jumbo packs remain snug and pricing is elevated.

Limes continue to climb. Reduced new crop volume out of Mexico due to bloom drop, heat, and humidity is limiting pack-outs and driving prices higher. Colombia is providing a more consistent alternative with better shelf life, but offshore supply isn't enough to cover demand. Expect volatility through March and possibly into early April.

Melons are in seasonal transition. Offshore cantaloupes remain sufficient, though cooler weather is shifting sizing toward 9- and 12-count fruit. Honeydews have been significantly impacted by lower temperatures and downy mildew. Yields are declining, and 8-count fruit is extremely limited. Western Mexico is helping offset offshore tightness, with steady supplies expected through late May.

Pineapples remain firm. Costa Rican supply continues to face strong demand and limited availability due to recent thunderstorms and ongoing planting gaps. Crownless and organic fruit are especially tight. The market is expected to stay elevated through mid-April.

The common thread this week is timing. Southeast recovery is still weeks away. Mexico is carrying more weight than usual, but yields aren't heavy and logistics remain unpredictable. As we move deeper into March, flexibility on size, grade, and origin will be critical. We'll keep watching conditions and provide updates as the situation evolves.

