



4/2/2026

Commodity Alert - Tomatoes

The North American tomato market remains under severe pressure this week, with supplies critically short across all varieties and growing regions. Weather-related disruptions continue to limit production, and many supplier partners have now formally called **AOG/Force Majeure** on existing contract programs due to these extraordinary conditions. As a result, availability is extremely constrained, prices are at elevated or record-high levels, and only gradual improvement is expected late April into May.

- **Florida:** Supplies remain extremely limited across all varieties, with very little to no round tomatoes available and tight Roma volumes expected to persist until late April. Cherry production is still recovering from earlier freeze damage, overall yields remain low, and quality is mostly fair to average.
- **Mexico:** Ongoing heat in Culiacán and Sonora is accelerating maturity, shortening shelf life, and creating production gaps. Strong domestic demand is absorbing most supply, while Holy Week labor shortages further restrict exports, resulting in very low export availability and mixed quality.
- **Canada (Greenhouse):** Cool, cloudy weather is slowing ripening and delaying harvest, keeping supply tight despite fruit on the plants. Quality remains very good; noticeably stronger than field-grown product and demand is steady, supporting firm to higher markets.

Overall Market: Round tomatoes are extremely scarce nationwide, driving heavy substitution into Romas, which are also in short supply. Grape and cherry tomatoes remain critically constrained. With many suppliers invoking AOG/Force Majeure, contract fulfillment is being impacted, pushing spot prices significantly higher. No advance pricing available. Quality varies (best in greenhouse) and shelf life is shorter in field crops. Market may potentially soften as high prices fully reach end buyers.