

The Source

MARKET ALERTS

Apples: Apple market gradually rising; large crops, lower packouts, and retail programs push demand and prices higher for small, lower-grade fruit until the new crop.

Bell Peppers: Florida bell peppers hit by freezes, supplies limited through April. Mexican green peppers tightened by pests, disease, and red harvests. Strong demand keeps prices elevated.

Blackberries: Central Mexico production limited by cold; labor and logistics affected by cartel activity, causing industry-wide shortages.

Blueberries: Prices rising due to adverse weather in Central Mexico, Chile, and California; limited availability worsened by cartel activity in Central Mexico and Baja.

Broccoli: Broccoli supplies tightening; prices rising through weekend due to Nov–Dec planting gaps.

Carrots: Bakersfield carrot harvest nearly done; Imperial Valley light. Supply improves in 2–4 weeks; early harvest = small carrots.

Citrus (Limes): Lime prices high from Mexican cold damage; tight supplies through April; limited relief from other origins; volatile markets.

Citrus (Oranges): California Navels skewed large; small sizes limited. Flexibility and substitutions needed; advance orders 4–5 days; elevated markets.

Eggplants: Florida eggplant done until late March; Mexico limited by weather; strong demand keeps prices firm through mid-March.

Melon (watermelon): Watermelon prices elevated; lower Mexican crossings shift focus to offshore; cooler temps slightly lower demand.

Pineapple: Pineapples stable but tight from rain/planting gaps; larger sizes rising late Feb; crownless and organic limited; contracts prioritized.

Squash: Florida squash limited post-cold snap; Nogales demand high; volumes improve in 2–3 weeks; yellow quality variable.

Tomatoes: U.S. tomato supplies tight from Florida freezes; Mexican volumes reduced by prior damage and unrest; market pressure through March.

Raspberries: Markets tightening as cold weather and cartel issues restrict CEMEX supplies.

Commodity of the Month - Strawberries

FEBRUARY 25, 2026

CROP UPDATES

Desert crops in AZ/CA are ~3 weeks ahead, with faster maturation and lighter yields tightening production. Lettuce supplies are modestly improved (Romaine most available), broccoli remains snug, Brussels sprouts recovering, and celery elevated. Green onions face ongoing sizing issues. Cross-border logistics add volatility for tomatoes, peppers, limes, avocados, mangos, and berries. With spring demand rising, markets may react quickly; Yuma's margin for error is narrowing. [Read more](#)

WEATHER

California: A few showers Wednesday; temps warming to mid 60s–low 80s through week, then cooling slightly Sunday.

Florida: Frost Wednesday in N/C Florida, warmer Thu; rain Fri–Sat, showers linger Sun; winds 15–20 mph.

Mexico: Temps warming mornings, highs mid 70s–low 80s, no rain next five days.

Arizona: Temps rise to 90s–100s by Friday in AZ/SE CA, then cooling starts Sunday; morning lows mid 50s–mid 60s.

FREIGHT

Weather woes out west last week are subsiding whilst the east coast is coming into snowy conditions. This will create a delay of backhauls back west. Expect capacity by next week in California, especially Yuma, to be light for the first week of March.



IN PEAK SEASON

- Avocados
- Grapes
- Pears
- Oranges
- Potatoes

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Commodity Updates



Apples

ALERT

The apple market continues to trend upward at a gradual yet steady pace. This season has presented notable challenges for foodservice sizes, as the overall crop across all varieties has skewed larger than typical. Coupled with lower packouts and aggressive retail bag programs, this has driven unusually strong demand and elevated pricing for smaller, lower grade apples. These conditions are expected to persist until the arrival of the new crop.

Commodity/Region	Supply	Price	Quality
Hudson, New York (September - June)	Steady	\$\$\$	Good



Asparagus

The Mexican asparagus market remains firm, with demand outpacing supply and FOB pricing holding at \$28 to \$30. Although all regions are harvesting, yields remain below historical averages. If production does not improve soon, supply could tighten further heading into Easter.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Light	\$\$\$	Fair
Peru (Year Round)	Steady	\$\$\$	Fair
Mexico (November - May)	Light	\$\$\$	Fair



Avocados

Markets in Mexico have edged slightly higher, with peak sizes running 40 and 48 count. Dry matter and oil content are in the low 30s, and the fruit is eating very well. We will provide updates if anything changes on the avocado front.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	High	\$\$\$	Good
California (April - July)	Light	\$\$\$	Good



Bell Peppers

ALERT

Florida: Severe freezes have caused major losses in unprotected bell pepper fields, with supplies expected to stay limited through March and April.

Mexico: Crossings are down due to pest and disease pressure and more red harvests, tightening number one green bell pepper volume through March.

Overall Market: Strong demand is expected to keep pricing elevated in the weeks ahead.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Light	\$\$\$	Poor
Mexico (November - May)	Light	\$\$\$	Fair

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Berries (Blackberries)

ALERT

Cold weather continues to limit production in Central Mexico. Industry wide shortages are expected as labor availability and logistics are disrupted by ongoing cartel activity in several growing regions.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Good



Berries (Blueberries)

ALERT

This item is seeing rising prices due to adverse weather in Central Mexico, Chile, and California. Availability is limited, and ongoing cartel activity in Mexico is expected to further constrain supplies from Central Mexico and Baja.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
Dover, Florida (Year Round)	Steady	\$\$\$	Good
McAllen, Texas (Year Round)	Light	\$\$\$	Good



Berries (Raspberries)

ALERT

Markets are rising as availability tightens. Cold weather and ongoing cartel issues are further restricting supplies from CEMEX.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
McAllen (October - May)	Steady	\$\$\$	Good



Berries (Strawberries)

California is recovering from last week's rain, with production expected to improve by the end of the week. Baja and CEMEX continue to face logistics and labor challenges due to recent cartel activity. Florida production remains steady, though cooler temperatures are returning, with overnight lows forecasted around 36 degrees, but no hard freeze is expected.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Fair
McAllen (November - May)	Light	\$\$\$	Good
Dover, Florida (Year Round)	Light	\$\$\$	Poor

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Broccoli

ALERT

Broccoli supplies are tightening this week, driving higher markets. Prices are expected to rise gradually into the weekend, as planting gaps from late November and early December rain events continue to limit availability.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	Light	\$\$\$	Fair
Yuma, Arizona (November - May)	Light	\$\$\$	Fair



Brussel Sprouts

Brussels sprout supplies and quality continue to improve, with the market expected to remain steady into next week.

Commodity/Region	Supply	Price	Quality
Mexico (December-August)	Steady	\$\$\$	Fair
Oxnard / Salinas, CA (May - July) (July-Dec)	Steady	\$\$\$	Fair



Carrots

ALERT

Harvest in the Bakersfield region is nearly complete, with growers beginning light activity in the Imperial Valley. Significant improvement in California carrot supply is expected in 2 to 4 weeks. Harvesting too early could result in smaller-sized carrots, but in a few weeks sizing and availability should be strong.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	High	\$\$\$	Excellent
Kern County (October - Feb)	Light	\$\$\$	Good
Various Northwest Regions (July - October)	Steady	\$\$\$	Good



Cauliflower

Cauliflower supplies remain tight but are gradually improving this week, with the market expected to ease slightly into the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Santa Maria, California (Year Round)	Steady	\$\$\$	Fair
Yuma, Arizona (November - May)	Light	\$\$\$	Fair



Celery

Overall, the market remains firm across multiple suppliers, with all sizes being harvested. Availability is moderate to light in both northern and southern regions. Elevated pricing on all value-added items is expected to continue at least through this week. Quality remains good, with only minor seeder issues reported.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Citrus (Grapefruit)

Star Ruby grapefruit are available, peaking at 48 count, and are being shipped from Riverside and the San Joaquin Valley.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
Texas (October - April)	Light	\$\$\$	Good



Citrus (Lemons)

District 3 (CA Desert/AZ) is finished. District 1 (San Joaquin Valley) will remain the main growing region until District 2 (Oxnard/Ventura County) ramps up around late March to early April. District 1 is currently peaking in 140, 165, and 115 counts.

Commodity/Region	Supply	Price	Quality
CA Desert/Yuma (October - February)	Steady	\$\$\$	Good
Oxnard/Ventura (February - September)	Light	\$\$\$	Fair
San Joaquin Valley (October - May)	Steady	\$\$\$	Good



Citrus (Limes)

ALERT

Lime prices remain high due to reduced Mexican yields from cold weather and January freezes. Tight supplies are expected through April, with limited relief from Colombia, Peru, and other sources. Volatile markets are likely at least through April.

Commodity/Region	Supply	Price	Quality
Veracruz (Year Round)	Light	\$\$\$	Good



Citrus (Oranges)

ALERT

The California Navel crop is heavily weighted toward larger sizes, peaking on 56 and 72 count, while small sizes (113 and 138 count) remain very limited through the season and into Valencias. Flexibility with size and grade will be needed, with substitutions to larger Navels or Cara Cara oranges likely. Suppliers will hold to contract size averages, and advance orders of 4-5 days are recommended. Expect elevated markets on Choice, Fancy, and small-size fruit, and encourage schools and DOD programs to accept 88 or 72 count.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (Year Round)	Light	\$\$\$	Fair



Cucumber

Eastern supply is primarily coming from Honduras, with limited volume and quality challenges. Florida fields are delayed, with gradual increases expected into April. Overall availability remains light to moderate in the near term.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Light	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Eggplant

ALERT

Florida's eggplant season has ended until late March, leaving Mexico as the primary supplier. Recent weather has limited Mexican volumes, resulting in an active market with high prices. Strong demand is expected to outpace supply, keeping markets firm through mid-March.

Commodity/Region	Supply	Price	Quality
Mexico (November - May)	Steady	\$\$\$	Good
Florida (November - May)	Light	\$\$\$	Good



Garlic

The California garlic crop is progressing well with good quality, complemented by ongoing Mexican supplies.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Steady	\$\$\$	Good
Bakersfield, California (Year Round)	Steady	\$\$\$	Good
Gilroy, California (Year Round)	Steady	\$\$\$	Good



Grapes

The import season is in full swing, with strong volume from Peru and Chile. Supplies are good on both coasts, prices are steady, and this market is expected to continue through April.

Grapes (Green)

Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good

Grapes (Red)

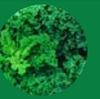
Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good



Green Onions

Green onion supplies remain very tight but are slowly easing from recent highs. Recent rains and cooler weather have lowered yields, and supplies are expected to stay limited into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair



Kale

Kale supplies and quality remain strong, with similar conditions expected into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Salinas, California (May - October)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Lettuce Iceberg

Supplies are expected to tighten by the end of this week and further next week. Very warm temperatures in Yuma starting Wednesday will likely lead to insect damage, lightweights, and puffiness. The best deals are expected Tuesday through Thursday, so plan heavier orders this week to take advantage of competitive pricing. Next week will see active markets, with escalated pricing continuing on all value-added lettuce items.

Commodity/Region	Supply	Price	Quality
Santa Maria, California (March-December)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Lettuce Leaf

Romaine, along with green and red leaf, is strengthening in the market. Warm growing temperatures are causing tip and fringe burn, as well as pink ribbing on all leaf items. Romaine hearts are tightening, and currently, romaine is the only value-added leaf item with escalated pricing.

Commodity/Region	Supply	Price	Quality
Salinas, California (May - October)	Steady	\$\$\$	Fair



Lettuce Tender Leaf

Tender leaf items like spinach, cilantro, and arugula are now in good supply and are expected to remain steady into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Yuma, Arizona (November - May)	High	\$\$\$	Good



Melon (Cantaloupe)

Westside and Nogales deals are complete. Offshore cantaloupes are available in California, Texas, Florida, and the Northeast. Pricing has stabilized due to tempered demand, influenced by nationwide weather concerns. Retail promotions in March are expected to boost movement.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

Offshore and Mexican honeydews are available, but challenges are expected throughout March. Fields in Guatemala and Honduras have been affected by plant viruses, leaving Mexican honeydews to help supplement the market.

Commodity/Region	Supply	Price	Quality
Arizona (June-July) (October-November)	Steady	\$\$\$	Good



Melon (Watermelon)



Lower yields and Mexican border issues have kept watermelon prices elevated. Cooler temperatures nationwide have slightly reduced demand, but limited Mexican crossings have shifted focus to offshore watermelons.

Commodity/Region	Supply	Price	Quality
Arizona (June-July) (October-November)	Steady	\$\$\$	Good



Mushroom

Supplies and availability are excellent.

Commodity/Region	Supply	Price	Quality
Nationwide	High	\$\$\$	Excellent



Onions

Onions are available from Washington, Idaho, and Utah. Demand has slowed this week due to nationwide weather concerns. Yellow and red onion prices remain steady, while white onion prices are rising, driven by transportation costs. Mexican onions from Texas have started, and U.S. Texas onions are also available.

Commodity/Region	Supply	Price	Quality
Eastern Orgeon/Parma, ID (August - April)	High	\$\$\$	Excellent
San Joaquin Valley (May - August)	Light	\$\$\$	Good
Tri-Cities, Washington (July - April)	High	\$\$\$	Good



Pears

The pear market is beginning to strengthen. Strong production of Anjou, Bosc, and Red pears is starting to meet rising demand. More shippers are finishing Bartletts for the season, and foodservice sizes are less available than in recent weeks.

Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Pineapples

ALERT

The pineapple market is stable compared to last week but remains tight due to prior rain and planting gaps. Contracts continue to take priority. Larger sizes are expected to increase slowly toward the end of February. For sizing, 6- and 7-crown counts are up, 8-crown counts are steady, and 8- and 10-crown crownless remain tight. Organic pineapples also remain limited.

Commodity/Region	Supply	Price	Quality
Costa Rica (Year round)	Light	\$\$\$	Good



Potatoes

Supplies and demand are good, with sheds actively making deals. Smaller counts are becoming harder to find. Burbank potatoes are now available, with Norkoths as the main variety. Washington potatoes are producing excellent quality, peaking on mid sizes, while large and small counts remain tight. Florida colored potatoes are available. Transportation is driving the market.

Commodity/Region	Supply	Price	Quality
Idaho Falls, Idaho (August-July)	Steady	\$\$\$	Good
Pasco, Washington (August-July)	Steady	\$\$\$	Excellent



Squash

ALERT

Florida production remains very limited following the recent cold snap, with Homestead fields still recovering. Both items are in light supply, with tight availability in key districts. High demand in Nogales is pushing prices higher. Volumes are expected to gradually improve in 2-3 weeks, though yellow squash quality remains variable.

Commodity/Region	Supply	Price	Quality
Mexico (June - September)	Light	\$\$\$	Good
Florida (November - May)	Light	\$\$\$	Poor



Stone Fruit

Imported peaches, plums, and nectarines are available with fair supply on both coasts, and the market remains steady with reasonable prices. A few domestic kiwis are still shipping from California, supplemented by imports from Greece and Italy. Domestic Asian pears are also shipping from California and are expected to continue at least through March.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley	Steady	\$\$\$	Good



Tomatoes

ALERT

U.S. tomato supplies are tightening sharply after late-January sub-freezing temperatures in Florida devastated crops, limiting domestic production through mid-April or later. Mexican volumes, usually a key supplement, are lighter than normal due to prior weather damage and recent violent unrest causing roadblocks, shipment delays, and freight issues. Tight supplies and market pressure are expected to continue through March.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair
Florida (November - May)	Light	\$\$\$	Fair

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Weather Updates



CALIFORNIA

A passing low Wednesday will bring a few lingering showers, but additional rainfall will be minimal. Morning lows will range from the low 40s to mid 50s, with daytime highs in the mid 60s to upper 70s. As high pressure builds Thursday, offshore winds will push temperatures into the mid 60s to low 80s through the end of the week. A low approaching Sunday will increase cloudiness and bring temperatures back closer to normal.



MEXICO

Mornings will gradually warm over the next couple of days, with daytime temperatures staying relatively warm. Steady conditions are expected over the weekend, with no rain forecasted for the next five days. Morning lows will range from the upper 30s to mid 40s on Wednesday, and mostly upper 30s to upper 40s from Thursday through Sunday. Daytime highs will remain in the mid 70s to low 80s through Sunday.



FLORIDA

Parts of northern and central Florida may see morning frost on Wednesday, with the risk ending by Thursday as warmer, more humid air moves in. Rain is likely Friday into Saturday, with early estimates around 0.50 inches across the state. Showers may linger into Sunday, with warm temperatures continuing. Winds are expected to gust 15 to 20 mph through Sunday across most of Southeast Florida and the Tampa Bay area.



ARIZONA

Temps warm to record levels for the last week of February under strong high-pressure ridging over the deep southwest. Highs will be in the mid 80s-low 90s for Arizona valleys Wednesday, low-mid 90s in southeast California, warming to 90s-100 by Friday afternoon. Morning low temps warm from the mid-upper 50s Wednesday, to upper 50s-mid 60s by Saturday. An upper-level low tracks toward AZ from the northwest starting a cooling trend by Sunday.

For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

Freight Updates



Weather woes out west last week are subsiding whist the east coast is coming into snowy conditions. This will create a delay of backhauls back west. Expect capacity by next week in California, especially Yuma, to be light for the first week of March.



U.S. On-Highway Diesel Fuel Prices*(dollars per gallon) [full history](#) [XLS](#)

	02/09/26	02/16/26	02/23/26	Change from		
				2 year ago	year ago	week ago
U.S.	3.688	3.711	3.809	↓ -0.249	↑ 0.112	↑ 0.098
East Coast (PADD1)	3.756	3.763	3.843	↓ -0.342	↑ 0.048	↑ 0.080
New England (PADD1A)	4.236	4.215	4.201	↓ -0.113	↑ 0.158	↓ -0.014
Central Atlantic (PADD1B)	4.021	4.030	4.104	↓ -0.220	↑ 0.142	↑ 0.074
Lower Atlantic (PADD1C)	3.605	3.612	3.708	↓ -0.412	0.000	↑ 0.096
Midwest (PADD2)	3.636	3.664	3.798	↓ -0.163	↑ 0.183	↑ 0.134
Gulf Coast (PADD3)	3.377	3.412	3.489	↓ -0.279	↑ 0.069	↑ 0.077
Rocky Mountain (PADD4)	3.539	3.607	3.683	↓ -0.316	↑ 0.188	↑ 0.076
West Coast (PADD5)	4.376	4.383	4.465	↓ -0.227	↑ 0.107	↑ 0.082
West Coast less California	3.969	3.970	4.050	↓ -0.177	↑ 0.142	↑ 0.080
California	4.845	4.860	4.944	↓ -0.281	↑ 0.067	↑ 0.084

*prices include all taxes

For more information: <https://www.eia.gov/petroleum/gasdiesel/>

Crop Updates



Running Hot in the Desert

As we close out February, it is becoming clear that the Arizona-California desert deal is running approximately three weeks ahead of schedule.

A combination of earlier rainfall followed by sustained above-average temperatures accelerated crop development across much of the Yuma region. Fields matured faster than anticipated, compressing harvest windows and tightening the overall production curve. While crews are still cutting and sheds are running steadily, the calendar is effectively ahead of itself. When the desert season advances this quickly, it reduces the cushion that typically exists in late February and March. Acreage that would normally be carrying the market deeper into spring is scheduled to be harvested sooner, and yields remain lighter than normal. The lack of demand across the country is setting up a false feeling of adequate supplies.

Lettuce supplies have shown modest improvement this week, particularly on iceberg. Romaine continues to be the most available, with strong internal quality and good color. Green leaf remains steady but is sensitive to any uptick in movement. Despite the short-term stability, there is little excess.

Brassicas are mixed. Brussels sprouts supplies have improved meaningfully after several weeks of elevated markets, with better volume and more orderly pricing. Broccoli remains snug, particularly as Mexican relief tapers and desert yields continue to feel the effects of earlier weather disruptions.

Celery continues to carry an elevated tone. Prior storm damage in California and limited recovery out of Florida have restricted overall output. Desert production is steady but not heavy enough to fully relax pricing.

Green onions remain one of the more challenged items. Winter seed performance issues, November rainfall, and early January wind events combined to reduce yields and prolong the sizing issue. Smaller size is expected to persist for several more weeks.

Beyond the products, cross-border logistics have introduced additional uncertainty. Recent disruptions in Mexico have led to rerouted freight, tighter refrigerated availability, and slower crossings. Tomatoes, peppers, limes, avocados, mangos, and berries are most exposed. While shipments across the border continue, volatility has increased, and transit timing bears monitoring.

As demand builds into early spring, markets may respond more quickly than typical. Yuma is still performing, but the margin for error is narrowing.

JOEY PIEDIMONTE
SOURCING MANAGER

