



## Weekly Market Review June 26, 2025

### Overview

**Tariff Update:** President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. However, a 10% tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.

We are going to be fighting some weather here in the Southeast but don't see any major delays on the horizon. We are also watching a very active tropical pattern off the west coast of Mexico that will continue to bring cloudy weather and heavy rain and local flooding to the region over the next few days. This may impact harvest schedules and freight coming from Southern Mexico to the US Border. Jalisco and Baja and Monterey will take on most of the Mexican volume on Tomatoes. Stronger demand on Romas will call for premiums across that category. Quality is very good out of Mexico. Georgia, North and South Carolina quality is good but will begin to wind down. Transition to North Carolina/Tennessee will start next week. California production on Tomato and veg is strong; good production on Bells will transition to Arvin this week. Slicer Cucumber is good out of Georgia and Baja. Items that remain light in supply are Tomatillo, Habanero and Jalapenos. The Mexican Table Grape season will improve out of Mexico this week and we should see some additional domestic volume out of the desert, as well. Arvin is about 1 week out. Melons are finishing up in the Desert and will transition to the Central Valley next week. Quality will continue to be very good. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. Banana supply will be volatile over the next several weeks due to a labor strike in Panama impacting the global supply chain. We do not expect major shortages at this time and are keeping a very close eye on this situation. New crop available out of California on yellow/white Peaches/ Nectarines, Red/ Black Plums and Apricots, there are also Peaches available in the East out of Georgia and South Carolina. Cherries out of Washington State. Avocado inventory levels have increased ahead of the 4th of July promotions, with strong availability across all sizes. Mexico is nearing the end of its season, offering high dry matter fruit with a large share of Grade 2s. The transition to the Flor Loca crop is expected by mid-July and may introduce some supply and pricing variability. The remaining old crop has good volume, especially on 48ct and larger, with promotional support in place. California production is tapering, though field prices remain firm due to steady demand. Peru continues to supply strong volumes through summer, with significantly more fruit in the market compared to last year, despite a lower crop estimate. Colombia's Traviesa crop remains active but will begin to decline as the season winds down by August. The price gap between large and small fruit is expected to narrow in the coming weeks. Temperatures in Salinas are slightly above normal as we wrap up the week. The outlook shows that those slightly warmer temperatures will continue through next week. The weather has not been a huge factor for quality since we have settled into Salinas but with Q3 and the height of summer around the corner, we are expecting to see supply and quality issues arise. Insect pressure and INSV have been minimal so far, but it is still early in the season. Overall, supplies and quality are still okay but the markets on a few items have started to increase. The Lettuce market shot up significantly over the past week. We are seeing some lighter weights and lower yields, but quality still remains good. We expect to see the market continue to rise with demand increasing. Lettuce and VA Blends are all escalated. Growers are doing their best to cover averages, but some outside labels are being used in order to fill orders at this time. The Romaine and Romaine Hearts market has continued to rise, and Romaine Blends and Hearts are all now escalated. Demand has increased and seems to be driving the market. Broccoli and Cauliflower supplies have gotten light with some growers. For Broccoli, the MX suppliers are extremely limited in supplies. A Market Alert was sent out on that. While they expect supplies to get a little better next week, they do expect to have supply issues throughout the summer. Both Broccoli and Cauliflower are now escalated with the limited supply driving the market. Quality still seems to be good but there have been reports of increased insect pressure on both items. Brussels Sprouts supplies are getting tight again. Some growers are losing yields due to quality. This is a tough time of year as Mexico is very hot, and some growers are winding down in Oxnard, so supplies are expected to be light for at least another week. Salinas will start up soon for some growers so supplies will improve at that time. Until then, supplies are light, and we will have growers holding to averages. Bok Choy, Napa, Endive, Escarole, Fennel and Leeks remain escalated. Overall production in Salinas is still steady.









### Alert List

- Avocados – **ESCALATED**
- Bananas – **ESCALATED**
- Bok Choy – **ESCALATED**
- Broccoli Crowns/Asian Cut/Org – **ESCALATED**
- Cauliflower – **ESCALATED**
- Celery Organic – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Garlic – **ESCALATED**
- Hot Peppers (Jalapeno, Tomatillo and Shishito) – **ESCALATED**
- Lettuce/VA Blends – **ESCALATED**
- Leeks – **ESCALATED**
- Limes – **ESCALATED ON LARGE SIZES**
- Napa – **ESCALATED**
- Table Grapes – **ESCALATED**
- Romaine Hearts – **ESCALATED**
- Romaine/ VA Blends – **ESCALATED**
- **White Asparagus**









### Watch List

1. Asparagus
2. Blueberries
3. Broccolini
4. Brussels Sprouts
5. Celery
6. Cilantro
7. French Beans
8. Herbs
9. **Lemons – SMALL SIZES**
10. **Oranges – SMALL SIZE NAVELS**
11. Pineapple
12. Ginger
13. Green Onions
14. Snow Peas & Sugar Snap Peas
15. Spinach









**Weather**  
**SALINAS, CA**

| Thu 6/26  | Fri 6/27  | Sat 6/28  | Sun 6/29  | Mon 6/30  | Tue 7/1   | Wed 7/2   | Thu 7/3   |
|---|---|---|---|---|---|---|---|
| 64°   52°F  | 68°   53°F  | 65°   54°F  | 67°   53°F  | 66°   53°F  | 67°   54°F  | 68°   55°F  | 65°   54°F  |
|  |  |  |  |  |  |  |  |
| AM Clouds/PM  | Partly Cloudy   | Partly Cloudy   | Mostly Sunny  | Partly Cloudy   | Partly Cloudy   | Partly Cloudy   | Partly Cloudy   |









**OXNARD, CA**

| Thu 6/26  | Fri 6/27  | Sat 6/28  | Sun 6/29  | Mon 6/30  | Tue 7/1   | Wed 7/2   | Thu 7/3   |
|---|---|---|---|---|---|---|---|
| 68°   59°F  | 70°   59°F  | 70°   57°F  | 70°   58°F  | 69°   58°F  | 69°   59°F  | 70°   60°F  | 70°   60°F  |
|  |  |  |  |  |  |  |  |
| AM Clouds/PM  | Partly Cloudy   | Partly Cloudy   | Mostly Sunny  | Partly Cloudy   | Partly Cloudy   | Mostly Sunny  | Mostly Sunny  |









**BAKERSFIELD, CA**

| Thu 6/26  | Fri 6/27  | Sat 6/28  | Sun 6/29  | Mon 6/30  | Tue 7/1   | Wed 7/2   | Thu 7/3   |
|---|---|---|---|---|---|---|---|
| 100°   71°F   | 103°   73°F   | 104°   73°F   | 103°   73°F   | 102°   72°F   | 102°   74°F   | 104°   76°F   | 103°   73°F   |
|  |  |  |  |  |  |  |  |
| Sunny   | Sunny   | Sunny   | Sunny   | Sunny   | Sunny   | Sunny   | Sunny   |









**HERMOSILLO, SONORA**

| Thu 6/26  | Fri 6/27  | Sat 6/28  | Sun 6/29  | Mon 6/30  | Tue 7/1   | Wed 7/2   | Thu 7/3   |
|---|---|---|---|---|---|---|---|
| 104°   82°F   | 105°   83°F   | 109°   84°F   | 114°   85°F   | 113°   84°F   | 107°   83°F   | 97°   81°F  | 94°   80°F  |
|  |  |  |  |  |  |  |  |
| Mostly Sunny  | Mostly Sunny  | Sunny   | Sunny   | Sunny   | Sunny   | PM<br>Thunderstorms   | PM<br>Thunderstorms   |









**JALISCO, NAYARIT**

| Thu 6/26  | Fri 6/27  | Sat 6/28  | Sun 6/29  | Mon 6/30  | Tue 7/1   | Wed 7/2   | Thu 7/3   |
|---|---|---|---|---|---|---|---|
| 84°   66°F  | 85°   67°F  | 84°   67°F  | 82°   67°F  | 80°   67°F  | 78°   66°F  | 77°   65°F  | 79°   66°F  |
|  |  |  |  |  |  |  |  |
| PM<br>Thunderstorms   | PM<br>Thunderstorms   | PM<br>Thunderstorms   | Thunderstorms   | Thunderstorms   | Thunderstorms   | Thunderstorms   | Thunderstorms   |









**VIZCAINO, BAJA**

| Thu 6/26  | Fri 6/27  | Sat 6/28  | Sun 6/29  | Mon 6/30  | Tue 7/1   | Wed 7/2   | Thu 7/3   |
|---|---|---|---|---|---|---|---|
| 102°   69°F   | 103°   68°F   | 105°   69°F   | 104°   69°F   | 103°   69°F   | 103°   69°F   | 98°   69°F  | 97°   72°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Sunny   | Sunny   | Sunny   | Sunny   | Sunny   | Sunny   | Sunny   |

**LAKE PARK, GA**

| Thu 6/26  | Fri 6/27  | Sat 6/28  | Sun 6/29  | Mon 6/30  | Tue 7/1   | Wed 7/2   | Thu 7/3   |
|---|---|---|---|---|---|---|---|
| 93°   71°F  | 92°   72°F  | 90°   73°F  | 89°   72°F  | 88°   73°F  | 87°   73°F  | 88°   74°F  | 89°   74°F  |
|  |  |  |  |  |  |  |  |
| PM<br>Thunderstorms   | PM<br>Thunderstorms   | Partly Cloudy   | Scattered<br>Thunderstorms  | Thunderstorms   | Thunderstorms   | Thunderstorms   | Thunderstorms   |

**HENDERSONVILLE, NC**

| Thu 6/26  | Fri 6/27  | Sat 6/28  | Sun 6/29  | Mon 6/30  | Tue 7/1   | Wed 7/2   | Thu 7/3   |
|---|---|---|---|---|---|---|---|
| 93°   71°F  | 92°   70°F  | 89°   70°F  | 91°   71°F  | 91°   72°F  | 87°   69°F  | 87°   69°F  | 90°   68°F  |
|  |  |  |  |  |  |  |  |
| Mostly Sunny  | Mostly Sunny  | Partly Cloudy   | PM<br>Thunderstorms   | PM<br>Thunderstorms   | Thunderstorms   | Scattered<br>Thunderstorms  | Partly Cloudy   |

## **Fruits & Vegetables**

**Tariff Update:** *President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. However, a 10% tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.*

**Avocados: ESCALATED** Markets across all sizes remain stable. U.S. avocado volumes closed at 63.3M pounds, holding steady with the previous week. Peru was the only country of origin (COO) to show a volume increase, with further growth expected through July, while other COOs remain stable. Small fruit and a high proportion of Grade 2s are still prominent in the field. The Main Crop (Hass) is averaging 37% dry matter, with ongoing rains likely to affect future harvests. California harvested 10.4M pounds, with fruit peaking on 60s and 48s and dry matter averaging 28%. The California Avocado Commission revised its crop projection to 340M pounds (down from 375M), but supply is expected through summer with strong eating quality. Colombia's Travesia crop remains active, particularly on medium and small sizes. As Peru supplies more large fruit, Colombian fruit may see increased market movement during the summer. Mexico's Flora Loca crop will begin harvests and should hit markets by mid-July.

**Bananas: ESCALATED** Banana imports remain extremely light for the next 4 weeks. We continue to struggle with several challenges of recent including record demand and overall lighter supply from the tropics. We are also seeing some logistical challenges due to the labor strikes in Panama that are impacting the global supply. Due to these challenges, we could see minor pro-rates across the network over the next four weeks. Overall, banana quality has been good and improving as we enter the summer grow cycle. Overall inventories are light, and we are seeing higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to keep a heavier than normal inventory on hand and self-manage color to protect from shorts.

**Pineapples: WATCHLIST** Pineapples will remain tight for some time due to low production in Central America. We are suggesting flexibility in sizes to ensure stability of the supply chain. Overall quality and taste are good.

**Table Grapes: ESCALATED** The table grape market remains strong on greens due to recent severe weather, including heavy winds, rain, and early heat in both Caborca and Hermosillo. We continue to see quality concerns, particularly with all green varieties, and estimate crop losses could exceed 2 million boxes. Given the current outlook, we continue to recommend subbing red varieties where possible over the next two weeks. Red markets have eased back some and there is significantly more volume on reds than green. Steady volume will continue out of Coachella and Arvin is expected to scratch next week. Looking ahead, as we transition into California's season, we anticipate more stable volume barring any unexpected disruptions to the crop.

## **Berries**

**Strawberries:** Supply and availability are expected to remain steady over the next few weeks. Quality is strong, the flavor is sweet, the color is full red, and the sizing is medium to large. This week in the valley, daytime highs averaged in the mid-60s, with morning lows in the low 50s. A persistent marine layer has kept mornings overcast before clearing to partly sunny afternoons with occasional breezes. These conditions have supported consistent production and overall quality. Conventional fields are producing clean, well-sized fruit. While some culling continues—mainly for softness and undersized berries—blocks transitioning to freezer production are reporting excellent yields and quality. Organic acreage remains 100% fresh, with similar size profiles. Occasional bruising or softness deeper in the pack is being managed by crews actively removing compromised fruit. Harvest scheduling continues to adjust to avoid overripe fruit, with second passes this week expected to improve consistency. Despite moving past peak, many blocks still show healthy flower and green fruit sets, with vigorous plant activity supporting continued fresh harvest through mid-June. Approximately 65–70% of conventional acreage has transitioned to cannery use, while the remaining acreage will stay fresh until the end of the month. Organic fields are on track to complete planting by early July. In Watsonville and Salinas, similar weather patterns—mid-60s daytime highs and low-50s nighttime lows—have supported strong fruit firmness and color development. While some bruising has been noted due to fast-paced harvesting, field teams are working to address this through improved management practices. These regions are currently in peak production, although not all varieties are aligned in their cycles; some have already peaked and are beginning to decline, while others are still ramping up.

**Blackberries:** Production is currently active across Central Mexico, Oxnard, Georgia, California, and Baja. Mexican production is steadily declining, while Georgia is at its peak. Oxnard remains consistent with stable output. Overall quality across all regions is strong, with fruit showing good size, color, firmness, and sheen. In Central Mexico, daytime temperatures range from the mid-80s to the low 90s. Scattered rain and isolated thunderstorms are forecasted, although conditions remain highly localized—some areas experience intermittent showers, while others remain dry. Humidity levels are rising, and while temperatures remain elevated, they are expected to stay below the low 90s. Fruit quality is generally good, characterized by medium to large size, firm texture, and predominantly black coloring. However, high heat has contributed to some issues, including red cell regression, attached calyx, and occasional soft or leaking fruit. Out of Georgia, blackberry volume is steady, with peak production expected to continue for a few more weeks before tapering off toward the end of June. Rain forecasted for next week may slightly impact output, but overall volume is expected to remain consistent through the rest of the year. A dip in July production is anticipated, which will be supplemented by increasing volume from Watsonville. The organic volume from Mexico is beginning to wind down and is expected to remain limited through July as the season concludes. In Watsonville, the weather has been mild and cool, with highs in the 60s and lows in the mid-40s to the mid-50s. Warmer conditions have helped conventional production begin to pick up. Quality has been excellent, with large, juicy fruit. Although current output is limited to a few pallets per couple of days, volume is expected to increase significantly starting in June, with strong availability anticipated through September. Organic production has also begun with initial scratch pickings and will remain limited for the next few weeks as it ramps up.

**Raspberries:** Watsonville raspberry crops are coming on strong and are expected to continue increasing over the next few weeks. The variety is performing well, with sweet, aromatic flavor, full red color, and good sizing. The weather in the region has been cool and mild, with highs in the 60s and lows in the mid-40s to the mid-50s. Conventional volume remains light for now but is expected to ramp up toward the end of June. Despite the lighter volume, quality has started off strong with clean, well-sized red berries. No organic volume is expected from this region for the season. In Central Mexico, daytime temperatures range from the mid-80s to the low 90s, with scattered rain and isolated thunderstorms forecasted. While some areas remain dry, others have seen intermittent showers. Humidity is increasing, but temperatures are expected to stay below the low 90s. Fruit quality is holding up well, with a strong red color, good firmness, and mostly medium-sized berries, with occasional larger ones. Some issues, such as overripe, uneven ripening, and crumbled fruit, are being observed due to the heat, but crews are actively managing pack quality. Volume has been steady, with a peak expected in late June. So far, rain has not caused significant damage, and recent cooler weather has helped improve overall fruit condition. Organic volume from this region continues to arrive in limited but consistent amounts.

**Blueberries: WATCHLIST** Central Mexico is also still active, though winding down. Daytime temperatures range from the mid-80s to the low 90s, with scattered rain and isolated thunderstorms forecasted across the region. These patterns are highly localized; some areas remain dry, while others experience intermittent showers. Humidity is rising, and temperatures are expected to stay elevated but stable. Conventional volume is trending downward on a weekly basis, with the season projected to conclude by early July. Organic production is expected to resume in August. Quality remains good overall, with strong bloom, flavor, and appearance; however, some redberries have been noted to be soft or leaking, and heat-related shriveling has been observed. In California's Central Valley, the weather has been hot, with highs in the 80s to 90s and overnight lows in the upper 50s to 60s. This warm trend is expected to continue into next week. Both conventional and organic production are at peak levels, although organic fields may be nearing a post-peak level. Fruit quality has been excellent, with strong bloom, good sizing, and great flavor. Production is expected to continue through the beginning of July, with good availability for both conventional and organic blueberries. In Georgia, production continues, and quality has remained consistent, but production is winding down. New Jersey is expected to begin harvest shortly, though recent rain has caused some delays. In the Pacific Northwest, Oregon's season is roughly six days away. A few days of triple-digit temperatures early in the crop have prompted close monitoring of fruit quality as harvest begins.

### Citrus

**Oranges: WATCHLIST ON SMALL SIZE NAVELS** Navel quality remains strong with solid demand as the season nears its end. Small sizes continue to be in short supply and are expected to remain limited throughout the season. Pricing on 88s and smaller is firming as the size profile shifts toward larger fruit. The Navel crop is expected to finish in late June or early July, and ample lead time is recommended for orders—particularly for small sizes—as many shippers are now holding to averages. Valencia season is underway and off to a strong start. The fruit's appearance is excellent, and the juice content is high. Sizing is peaking on 72s, 88s, and 113s. However, early estimates indicate a lighter overall crop volume this year. Initial harvests are yielding smaller fruit, with sizing expected to increase as the season progresses through the summer.

**Lemons: WATCHLIST ON SMALL SIZES** With rising temperatures, demand for fresh lemons is increasing. Harvest and packing are in full swing in District 2, and both size and grade curves are tracking as expected for the region. The current size structure is trending toward 140s, 115s, 165s, and 96s. Promotable volumes are available on Choice grade fruit, particularly in 140s and larger. However, smaller sizes—165s and 200s—remain limited. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

**Limes: ESCALATED ON LARGE SIZES** We are starting to see supplies improve slightly on 175's while 110's and 150's remain snug. We will need to sub to 175's this week on orders calling for 150's and smaller. Good supplies on smaller-sized fruit (200's, 230's and 250's). Quality is improving.

**Imports/Specialties:** Blood Oranges will be finishing for the season in the next few weeks. Sizing is running small. Grapefruit is available with light supplies on Fancy grade; choice grade is available. Cara's, Minneolas and Mandarins are all but finished for the season.

### West Coast Lettuce

**Iceberg: ESCALATED** Lettuce quality looks good, but supplies have gotten tight. We are seeing lighter weights and increased demand. There have been some reports of INSV, but they have been minimal so far. The market is now escalated. Recent harsh weather in MX has increased demand on the CA supply and is putting unexpected pressure on the Salinas region.

**Iceberg VA: WATCHLIST** Quality looks good, but supplies have tightened up.

**Romaine & Romaine Hearts: ESCALATED** Romaine and Romaine heart quality are good, but supplies are getting a little tight. There have been some reports of fringe burns and light cupping. Insect pressure could become an issue as we get into Spring weather. We have also had some initial reports of small amounts of INSV and sclerotinia in some of the romaine fields. The market is trending higher. Romaine, VA Blends and Romaine Hearts are all escalated.

**Romaine VA: ESCALATED** Quality and supplies are good, but we are keeping an eye on insect pressure and the weather.

**Green Leaf and Red Leaf:** Quality and supplies look good.

### **Eastern and Western Vegetables:**

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**Green Bell Pepper:** Good supply available in McAllen, South Georgia. Coachella will finish this week and should start transitioning to Arvin and Bakersfield early next week. Quality is good in all markets.

**Color Bell Pepper:** Good supply available in McAllen as well as crossing from Baja; Coachella will wrap up for the summer this weekend then start the transition to Bakerfield and Arvin. Canada remains steady on 11# all sizes. South Georgia should ramp up production on reds over the next week. Quality may be mixed this week due to heat in the South and The Desert.

**Mini Sweet Pepper:** Supply stable this week and quality is good.

**Mixed Chili Pepper: WATCHLIST** Supplies in general are good across most varieties out of Mexico, but quality is mixed. We should scratch new fields in Baja this week which will improve supply and quality. Jalapeño and Tomatillo were lighter this week. Shishito will be the shortest and could see some supply interruptions. Fresno started picking some Poblano and Jalapeno this week and South Georgia should start over the next 7 to 10 days.

**Eggplant:** Domestic supply is steady out of the desert, and quality is outstanding. South Georgia will start this week.

**Slicer Cucumbers:** Stable supply crossing through Otay and McAllen. Domestic supply out of Georgia is steady and the quality is outstanding at all points.

**English Cucumbers:** Good supply available this week. Quality is good.

**Pickles:** Stable supply expected over the coming weeks out of South Georgia.

**Green Beans:** Good Supply available with new crop beans coming available out of Georgia and Baja. We are seeing some rain in the region and could impact supply over the next week. Coachella should ramp up over the next week. Quality is good.

**French Beans: WATCHLIST** The market remains active across most presentations, with potential vessel delays posing a risk to short-term availability. Volume is expected to remain steady through next week. Overall quality is reported as good, and pricing remains generally unchanged.

**Zucchini/Yellow Squash:** Good volume available in South Georgia. In the west we now in Full production out of Fresno and Baja with some lingering production out of Sonora. Quality is good.

**Herbs: WATCHLIST** Basil quality continues to be affected by rain in Colombia, while imported chervil remains extremely limited due to adverse weather in Ecuador. On the West Coast, the supply and quality of basil are strong. Supply on all other herbs is steady, with chervil being the notable exception due to ongoing weather-related challenges.

| HERB       | SUPPLY       | QUALITY  | COUNTRY OF ORIGIN |
|------------|--------------|----------|-------------------|
| Arugula    | Limited      | Marginal | USA               |
| Basil      | Very Limited | Marginal | USA/MEX           |
| Opal Basil | Very Limited | Marginal | USA               |
| Thai Basil | Very Limited | Marginal | USA/MEX           |
| Bay Leaves | Steady       | Steady   | USA/COL           |
| Chervil    | Limited      | Limited  | USA               |
| Chives     | Steady       | Steady   | MEX               |
| Cilantro   | Limited      | Marginal | USA/MEX           |
| Dill       | Steady       | Steady   | USA/MEX           |
| Epazote    | Steady       | Steady   | MEX               |
| Lemongrass | Steady       | Steady   | USA               |
| Marjoram   | Steady       | Steady   | USA               |
| Mint       | Steady       | Steady   | USA               |

|                 |              |          |     |
|-----------------|--------------|----------|-----|
| Oregano         | Steady       | Steady   | USA |
| Italian Parsley | Steady       | Steady   | USA |
| Rosemary        | Steady       | Steady   | USA |
| Sage            | Very Limited | Marginal | USA |
| Savory          | Steady       | Limited  | USA |
| Sorrel          | Steady       | Steady   | USA |
| Tarragon        | Steady       | Steady   | MEX |
| Thyme           | Very Limited | Marginal | USA |
| Lavender        | Steady       | Steady   | USA |
| Lemon Thyme     | Steady       | Steady   | USA |
| Lime Leaves     | Steady       | Steady   | USA |

**Melons:** Excellent supply and quality out of the desert on cantaloupe and honeydew. Watermelons are also in good supply.

**Cantaloupe:** Yuma is now in full swing and sizing will improve as we start to see a more typical pattern of 9s followed by 12s. Field reports show excellent quality from the desert. Fruit quality is outstanding, seeing good shell and internal color in the fields; brix levels mostly in the 14-16% range consistently. Good supply on Athenas out of South Georgia.

**Honeydew:** Honeydew production has started off strong and is coming in with an excellent mix of 5s and 6s. The domestic dews are mostly clean with occasional scarring showing which is common in the desert due to higher winds in the region throughout the growing cycle. Brix levels on the dews are mostly in the 14-16% range.

**Watermelon:** Watermelon volume is very good out of Mexico, Georgia, South Carolina and Florida; growers are making dealing on all sizes. Quality is outstanding.

#### **Mixed Vegetables**

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**Artichokes:** Quality and Supply are good.

**Asparagus: WATCHLIST** Domestic supplies remain limited as Michigan and Washington wind down their seasons. Washington has concluded reporting, while Michigan prices have trended upward. Despite this, the overall market is expected to remain steady, supported by consistent production from Mexico and Peru. White Asparagus is likely to experience a production gap that will persist through the end of July.

**Bok Choy: ESCALATED** Quality is good, but supplies are still limited. The light supplies are driving the market.

**Broccoli/Broccoli Crowns: ESCALATED** Quality is still good, but supplies have tightened up with the majority of the growers. Demand is increasing and insect pressure has been reported and is affecting yields. MX has had severe weather and increased insect pressure resulting in extreme shortages.

**Broccolini and Sweet Baby Broccoli: WATCHLIST** Quality and supplies are good.

**Brussels Sprouts: WATCHLIST** Supplies are getting tight again. Things should improve as we get into Mid July but until then, you can expect to see growers holding to averages and we may see pricing escalated again.

**Carrots (JUMBOS, MEDIUMS and CELLOS):** The Desert growing regions are finishing for the season and will be transitioning to the Central San Joaquin Valley and southern Monterey County growing regions for the summer with good supplies and very good quality.

**Cauliflower: ESCALATED** Quality is good, but supplies are light with some growers. We are also seeing insect pressure, a little discoloration and creamy color.

**Celery: WATCHLIST** Quality is good, but supplies are light with some growers. Sizing has shifted towards 30/36ct. Some growers will transition to Salinas in June and that will also cause supplies to tighten up. The Organic Market is still increased.

**Corn, Sweet:** Excellent supply out of South Georgia. In the west, the desert and Brawley are done and have transitioned to Tracy and Brentwood. We are seeing a split market with significantly higher prices in the west. Quality is good in all locations.



**Fennel: EXTREME** The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve.

**Kale: Supplies** have improved, and quality is good.

**Leeks: ESCALATED** Leeks are very tight right now and some growers are holding to averages. The market remains escalated.

**Garlic: ESCALATED** The 2024-2025 California Garlic season is ending and as is sometimes the case during the transition from old crop to new crop garlic, there is a supply gap before the new California harvest begins. Growers are currently supplementing with product from Mexico to Bridge the Gap until new crop California Garlic gets started the first week of August. Quality remains good although available supplies will be decreasing, "PRICING WILL BE ESCALATED"!

**Ginger:** Supplies and market are steady.

**Green Cabbage:** Supplies and quality look good.

**Green Onions: WATCHLIST** Supplies and quality look good but there have been some initial reports of light supplies.

**Mushrooms:** Promotable volume available and quality is good.

**Napa Cabbage: ESCALATED** Quality and supplies are improving but there is some insect pressure.

**Parsley (Italian & Curly): ESCALATED** Supplies and quality look 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: WATCHLIST** Quality and supplies are good.

**Spinach: WATCHLIST** Supplies are limited with some growers and quality is good. We have seen some reports of weak texture, discoloration, wilting and there has been some insect damage, but it is all minimal right now.

**Snow Peas and Sugar Snaps: WATCHLIST** Guatemalan production remains light due to ongoing heat stress. However, relief has come from Peruvian imports and domestic supply. Prices have increased as a result, and quality remains variable across regions.

#### **Onions:**

The onion market is not expected to see significant movement during Q3. Ample supply from California and New Mexico is anticipated to carry through the first half of the quarter, while the Northwest is projected to have a strong crop this season. The latter half of Q3 will largely be a "harvest market," meaning onions will need to ship fresh and cannot be stored, regardless of market conditions. Looking ahead, the long-term outlook for the Northwest is less favorable going into next year, despite expectations for similar or increased acreage compared to last season. Barring any major weather disruptions, the industry should have more than enough supply to meet and exceed demand across all colors and sizes for the remainder of the calendar year.

#### **Potatoes:**

While the market has remained relatively flat for most of the calendar year, we're now beginning to see supply tighten and prices inch upward. The first half of Q3 is expected to be tighter than we've seen in some time, with current supply constraints primarily affecting larger-size cartons (40ct through 70ct). However, as we approach the end of the storage season, availability across all sizes and grades is expected to become more limited. The second half of Q3 will transition into new crop Norkotahs, ushering in typical "harvest market" conditions. Pricing is anticipated to begin slightly higher than where storage crop Burbanks will finish but should gradually decline as harvest volumes ramp up. Acreage in Idaho is expected to be similar to last year, and assuming no major disruptions, we can anticipate a market similar in tone and behavior to the previous season.

#### **Tomatoes:**

**Tariff Update:** *President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. However, a 10% tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.*

#### **East Coast**

**Round and Roma Tomatoes:** The season will be winding down out of Georgia and South Carolina this week and start the transition to Tennessee by July 10<sup>th</sup>. Currently we are not anticipating any major supply dips or gaps; production seems to be picking up out of North Carolina on rounds and Romas. Current quality will be mixed due to weather.

**Snacking Tomatoes (Cherry, Grape and Medley): ESCALATED** Lighter supply available due to the rain, quality remains good.

### **Mexico**

- **Round Tomatoes:** Production was down slightly due to clouds and rain out of Jalisco but should improve once the weather clears. Baja volume remains steady, overall demand stays light this week on rounds despite seeing excellent quality.
- **Roma Tomatoes:** Production was down this week in Jalisco and San Luis Potosi due to weather and demand was higher this week on the National Market as well as here domestically. Pricing was a bit higher this week on the spot but expected to fall back by the middle of next week. Quality remains good.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Steady supply and light demand have put downward pressure on FOB pricing; quality remains good.
- **Tomato on the Vine:** Stable volume available this week.

### **California**

- Volume ramping up out of the valley and should continue to improve over the coming weeks. Quality is good.

### **Other Fruit:**

**Apples:** **Red Delicious** apples have good availability across all sizes and grades, with a steady market expected to carry through until the new crop begins around the second week of September. **Golden Delicious** supplies remain available in most sizes and grades, though some growers are nearing the end of their season. Availability should continue for another month or two, though tightening supply may lead to firmer pricing. **Gala** apples show strong availability across all sizes and grades, with the market holding steady and supply projected to last until new crop harvest in mid-August. **Fuji** remains well supplied in larger sizes and higher grades, with steady markets expected through September. **Pink Lady** apples are solid in both supply and quality, though a brief gap may occur prior to the new crop harvest in October. **Honeycrisp** is experiencing tight supply across all sizes and grades; most USXF/WAXF #2 fruit has finished for the season. The market continues to strengthen, and a short gap is anticipated before new crop availability resumes in August. **Granny Smith** apples are in good supply across all sizes and grades, with steady markets expected to continue until the early September harvest. On the organic side, Gala, Fuji, Pink Lady, and Granny Smith apples are available in very limited volumes across most sizes and grades, while Honeycrisp is mostly finished until the new crop returns in August.

**Pears:** **D'Anjou** availability is tight and primarily limited to US #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 US #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 availability.

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

**Cherries:** Season is done and has transitioned to Washington.

**Stone Fruit:** New crop Peaches, Nectarines, Plums and Apricots now available out of California. Peaches are now available in South Carolina and Georgia as well.

**Kiwi Fruit:** Supplies fair out of California as well as offshore landing on the East Coast.

**Quince:** Limited supply available this week.