



Weekly Market Review July 24, 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.*

Tomato Suspension Agreement Update

As we continue to navigate the impacts of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties will be imposed on Mexican tomatoes, as growers were notified just Monday evening of the duties being retroactive. We are actively working with each grower partner to gather a breakdown of how duties will be applied for tomatoes imported from Mexico and will provide updates once we have completed the implementation process.

Post Suspension agreement demand has been decent domestically as well as for Mexico going into the weekend. There is a lot of uncertainty about the cost impacts since the termination of the agreement, at both retail and foodservice. Grape Tomato supply started to improve this week; large rounds remain tight this week while smaller sizes remain in good supply. Romas were firm this week, but supply stayed steady despite the higher demand. Quality across the entire category out of Mexico is excellent while domestic fruit was fair out of North Carolina and Tennessee. California production on tomatoes is strong; production on mixed dry veg will be challenging this week on both coasts due to transition. The tightest items continue to be Green and Color Bell Pepper and Tomatillo. Grape season is well underway in California; quality and supply are excellent, and we should see steady markets now through late October. Melon supply out of Firebaugh is steady and quality is outstanding. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. 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 with Cherries out of Washington State. Mexico's smooth transition from Old Avocado Crop into the new Loca Crop has provided much-needed pricing relief and stability in the market, an improvement over the more volatile transitions seen in recent years. Backed by a strong 12-month crop outlook, Mexico's consistent supply, combined with solid volumes from Peru, California, and Colombia, is helping support increased demand. Market conditions remain steady, with strong industry-wide inventory levels enabling promotable fruit across all sizes. The new Flor Loca Crop is now underway in Mexico, offering a balanced size curve of large, medium, and small fruit. California production is beginning to taper as the season winds down, with harvests expected to continue through September. Peru continues to deliver consistent shipments with excellent availability, particularly on large and jumbo sizes. Temperatures in Salinas are normal for this time of year. We have continued to see some supply and quality issues arise. Insect pressure and INSV have been reported in the fields. Supplies continue to be light for a few items, but we are starting to see things improve. Although the Lettuce market is no longer escalated, supplies are still limited with some growers. We are still seeing lighter weights and lower yields, but quality remains good. Growers are doing their best to cover averages, but some outside labels are still being used to fill orders. You can still expect to see growers holding to averages on Lettuce and VA Blends until supplies are ample again. The Romaine and Romaine Hearts are also off escalation, but we are still seeing some quality and supply issues. Fringe burn and INSV are present in some fields. Broccoli supplies have improved but are still light with some growers. MX growers still expect supply issues throughout the summer. Quality still seems to be good but there have been reports of increased insect pressure. Brussel Sprouts supplies are still very tight. Some growers are losing yields due to quality. Salinas has started up for some growers so supplies should start to improve but for now, the market is still at the extreme level. Growers are holding to 10-week averages when they can, but some growers have started prorating. The prorating should be short term, but you can expect it for at least another week. We will keep everyone updated on any new information we receive. Bok Choy, Napa, Endive, Escarole, Fennel and Leeks remain escalated. Fennel supplies have gotten light, and we have started to see prorates from a few growers. While supplies are starting to improve, we will still see some supply gaps as we continue into the summer. Valencia orange's appearance is excellent, and the juice content is high. Sizing is peaking at 88s, followed by 113s. Some growers are seeing some regreening on the oranges, causing extended gas times. With the gas time varying, please give as much lead time as possible. Choice grapefruit is readily available, but most growers are requiring ample lead time for Fancy grapefruits. With rising temperatures, demand for fresh lemons is increasing. As we push towards the end of District 2's season, things are continuing to remain tight on small lemons. Size structure is peaking at 140/115ct choice. 140/165/200ct Lemons are remaining extremely tight and are projected to remain tight through October. Fancy grade percentage is down this season due to high wind events, which have impacted fruit quality. Volumes are expected to continue to decline as we move into August. District 2's season is anticipated to conclude around mid-September. Weather conditions remain favorable. District 3 is projected to begin in approximately 6 weeks. Growers continue to evaluate fruit across District 3 and are seeing volume fluctuations between regions. Early indicators point to a smaller overall crop this season, though fruit sizing has improved compared to last year. Please note that there is a global strain on lemons. In Mexico, early picks are expected to begin within the next two to three weeks, with initial crossings anticipated in early to mid-August. While the fruit is still maturing, sizing is trending toward 140s, 165s, and 200s, with grade leaning more toward Choice. Argentina continues to ship significant volumes to Europe and Russia, with 4.5 million cases sent to Europe so far, which is a 71% increase over the total volume shipped to that market in 2024. Peak sizes range between 95s, 115s, and 140s. While overall fruit quality is improved compared to last season, it still varies by supplier. We anticipate shipments to the U.S. to continue through mid-August. At this point, Argentina is approximately 70% through its crop. Chile has shipped close to 1,200,000 boxes to the USA. Pack outs have been predominately 115s, 140s, and 165s, with approximately 70-80% of the crop being Fancy. Overall volume is projected to increase by about 5% compared to last year, reaching an estimated 21–22 million boxes. In the recent weeks they have increased shipments to an average of 175k cases per week into the United States, with 70% of the volume headed to the East Coast. That volume is expected to remain the same as Chile is shipping a considerable volume to other markets such as Asia and Europe. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

Alert List









- Avocados (Smaller Fruit) – **ESCALATED**
- Asparagus – **ESCALATED**
- Bell Pepper, All Colors– **EXTREME**
- Bok Choy – **ESCALATED**
- Brussel Sprouts – **EXTREME**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Garlic – **ESCALATED**
- Hot Peppers (Tomatillo) – **ESCALATED**
- Leeks – **ESCALATED**
- Napa – **ESCALATED**
- Sweet Corn – **ESCALATED**
- White Asparagus

Watch List









1. Broccolini
2. Cilantro
3. French Beans
4. Herbs
5. Lemons, Small Sizes
6. Lettuce
7. Pineapple
8. Ginger
9. Green Onions
10. Snow Peas & Sugar Snap Peas
11. Spinach
12. Spring Mix

Weather









SALINAS, CA

Thu 7/24	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31
68° 57°F	66° 56°F	66° 55°F	67° 53°F	69° 54°F	67° 54°F	66° 55°F	66° 55°F
							
AM Clouds/PM Sun	AM Clouds/PM Sun	AM Clouds/PM Sun	AM Clouds/PM Sun	Partly Cloudy	Mostly Sunny	AM Clouds/PM Sun	Partly Cloudy









OXNARD, CA

Thu 7/24	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31
69° 58°F	70° 59°F	70° 58°F	70° 59°F	71° 60°F	72° 59°F	72° 60°F	71° 60°F
							
Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Sunny	Sunny









BAKERSFIELD, CA

Thu 7/24	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31
92° 66°F	90° 66°F	90° 66°F	94° 69°F	98° 71°F	99° 71°F	99° 70°F	99° 71°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









HERMOSILLO, SONORA

Thu 7/24	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31
110° 81°F	112° 81°F	112° 81°F	110° 82°F	107° 84°F	105° 84°F	106° 84°F	102° 83°F
							
Sunny	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy









JALISCO, NAYARIT

Thu 7/24	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31
84° 68°F	82° 68°F	80° 67°F	81° 66°F	82° 67°F	85° 67°F	85° 66°F	81° 66°F
							
Scattered Thunderstorms	PM Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	PM Thunderstorms	Scattered Thunderstorms	Thunderstorms









VIZCAINO, BAJA

Thu 7/24	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31
98° 76°F	96° 76°F	95° 76°F	94° 76°F	94° 76°F	96° 76°F	95° 74°F	92° 74°F
							
Mostly Sunny	Partly Cloudy	Isolated Thunderstorms	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms

LIBERTY, TN

Thu 7/24	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31
94° 73°F	93° 74°F	94° 74°F	93° 75°F	94° 75°F	98° 74°F	97° 73°F	93° 71°F
							
Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Mostly Sunny	Sunny	Sunny	PM Thunderstorms

HENDERSONVILLE, NC

Thu 7/24	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31
87° 70°F	95° 74°F	96° 73°F	95° 75°F	95° 73°F	96° 73°F	97° 73°F	93° 69°F
							
Partly Cloudy	Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Sunny	Mostly Sunny	PM Thunderstorms

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 (Smaller Fruit) The U.S. avocado industry closed last week at 69.2 million pounds, marking the third consecutive week of volume increases. Harvest began strong, supported by steady demand for smaller sizes, but has since slowed. The industry remains in transition between crops, with current harvest activity consisting of approximately 66.7% Off-Bloom and 33.3% Main Bloom fruit. Jalisco now represents 12.9% of Mexico's shipments to the U.S., as the Main Crop nears completion with fruit averaging 38% dry matter and a continued presence in Category 2. Meanwhile, the Off-Bloom (Loca/Mendez) crop is gaining momentum, exhibiting a clean profile and a typical size curve that peaks at 48s and 60s. Strong volumes from both Peru and California are expected to continue through August, ensuring ample supply. Markets saw a decline in larger fruit, but smaller fruit remains steady. Approximately 10 million pounds were harvested in week 29 out of California. Dry matter is averaging 28%. Sizing continues to peak in 48s and 60s. Harvest volume has tapered from season highs in April and May, with steady reductions expected through August. Quality remains strong, and California fruit is anticipated to remain available through early fall. Colombia's Travesia Crop is in its latter stages, with roughly 5-6 weeks of volume remaining before transitioning to the new crop. Dry matter ranges between 26-27% depending on the region, and sizing continues to focus on medium to small fruit. The next harvest is expected to begin in late August or early September from lower-altitude growing regions.

Bananas: Banana supply remains stable at this point in the summer but will most likely tighten back up once school starts back up for the fall. Overall, banana quality has been very good. We will continue to advise distributors and customers to keep a close eye on ripeness throughout the summer months; warm weather can lead to fruit ripeness running away from you. Proper storage temps and sufficient air flow where product is being stored is critical during these warmer months.

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: Now in full production out of California; quality and supply are stable on Flames, Sugraones and Ivory varieties. We should continue to see improvements over the next several weeks.

Berries

Strawberries: Production is slowing across all growing regions, Santa Maria, Salinas, and Watsonville, as the season moves past its peak. Volumes are expected to continue declining through July and August before production ramps up in the fall from Santa Maria and Oxnard. Despite the seasonal dip, overall quality remains strong. Wet, foggy mornings have led to increased reports of bruising and decay, but QA teams are effectively managing quality through careful sorting. Fruit continues to show full color, medium to large sizing, and strong eating quality.

Blackberries: Production is currently active in Central Mexico, Baja, and Oxnard, while Georgia and Tennessee officially wrapped up for the season. Hot and humid conditions across the Midwest and the East Coast are creating challenges for crops in the Southeast and Northeast. Quality out of Mexico has been fair to good, with some reports of softness and color reversion, while fruit from Tennessee and Oxnard is showing stronger performance. Quality is being closely monitored across all regions. Supplies are expected to remain tight over the next several weeks.

Raspberries: Active production continues in Central Mexico, Baja, and Watsonville, with steady supplies and consistent availability. Quality remains excellent, highlighted by sweet, aromatic berries with strong flavor and full color. Fruit is performing exceptionally well, supporting strong market demand.

Blueberries: Production is active in Central Mexico, Oregon, and New Jersey. Central Mexico volume remains low but consistent. New Jersey is improving after a slow start, which was caused by heat, humidity, and labor shortages. Oregon is ramping up and coming into peak production, with strong volume expected through late July. Overall supply is steady and availability is good.

Citrus

Lemons: WATCHLIST ON SMALL SIZES (165's and below) Lemons are looking extremely tight as we continue towards the end of summer. Most shippers are holding to averages, particularly on the smaller sizes. Fancy grade percentage is down this season due to high wind events, which has impacted fruit quality. There will be little to no relief on the import side of the market if you are not participating on an import program.

Limes: Supply of larger sized fruit continues to improve while supply remains plentiful 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: WATCHLIST Lettuce quality looks okay and supplies have improved. We are still seeing lighter weights and increased demand. There have been some reports of INSV, but they have been minimal so far. There is some light to moderate levels of sclero, fusarium and thrip damage. Some growers are holding to averages. The market is no longer escalated but we could see more issues arise with supplies as we get into the summer months.

Iceberg VA: Quality and supplies look okay. Some growers are holding to averages.

Romaine & Romaine Hearts: Romaine and Romaine heart quality and supplies are okay. There have been some reports of fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Some growers are holding to averages. Organic Romaine Hearts are still triggered.

Romaine VA: Quality and supplies are okay, but we are keeping an eye on insect pressure and the weather. Some growers are holding to averages.

Green Leaf and Red Leaf: Quality is good, but supplies are a bit light. We have seen mildew and fringe burn pressure.

Eastern and Western 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.*

Green Bell Pepper: EXTREME Light supply continues, and demand will remain strong this week. In the west, Bakersfield is done while the coastal plantings are slowly ramping up. We hope to see some relief in the west this coming week. In the east, rain has delayed the crops and it looks like several regions are about 10 days behind. Quality is good but supply will be short enough that scaling back portions and making substitutions will be necessary over the coming weeks.

Color Bell Pepper: EXTREME High demand and very short supply out of the east and west coasts have driven markets to record highs this week. Canada remains steady on 11# all sizes but prices are up. Transitions and rain delays domestically have caused these shortages. Quality is mixed; you will see a lot of greener skinned fruit this week and next, but overall quality will be fair. We expect to see short markets over the next 10-14 days. We recommend scaling back portions if necessary while we navigate these shortages.

Mini Sweet Pepper: Supply was lighter this week and quality is good.

Mixed Chili Pepper: ESCALATED Supplies in general are fair across most varieties out of Mainland Mexico, Baja and California this week. Supply is slowly improving as is quality. Tomatillo remains light this week and quality is fair at best due to heat damage.

Eggplant: Domestic supply is steady out of Fresno and the Local regions in the east. Quality is good.

Slicer Cucumbers: Stable supply crossing through Ota and McAllen. Domestic supply out of North Carolina and Tennessee is slowly improving. Quality is outstanding in the west and fair in the east.

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

Pickles: Light supply expected over the coming week out of South Georgia and should then transition to the Carolinas as well as Michigan.

Green Beans: WATCHLIST Supply and quality will be mixed this week as most growing regions deal with weather-related pressure. mixed.

French Beans: WATCHLIST Guatemala experienced an increase in volume this week, although supplies are expected to remain steady over the next few weeks. Quality remains strong, and pricing out of the East has been generally unchanged. Meanwhile, Mexico continues to provide a fair supply of French beans.

Zucchini/Yellow Squash: Loading new crop out of the Carolinas and Tennessee, markets have eased back. In the west, we are now in full production out of Fresno and Baja with some lingering production out of Sonora. Quality is good.

Herbs: WATCHLIST In the East, basil quality continues to struggle due to persistent rain in Colombia. Imported chervil has begun arriving from Ecuador, though volume remains very limited. Out West, basil supply and quality are strong. Overall, supply on most other herbs is steady, with the exception of chervil, which remains limited due to 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

Cantaloupe: We have completely transitioned to the central valley this week and loading fruit out of Firebaugh and Huron! Fruit quality is outstanding; we are seeing good shell and internal color in the fields; brix levels mostly in the 14-16% range consistently. Sizing distributions is starting to improve with a good mix of 9's and 12's available. Supply should be steady going forward barring any unforeseen weather that could impact the crop.

Honeydew: Honeydew production has leveled off and the crop is producing a fair distribution of 5's and J6's. We do expect supply and sizing to remain stable for the next several weeks. Quality is good; mostly clean shell, we are seeing occasional scarring on these first picks. Brix levels on the dews are mostly in the 14-16% range.

Golden Honeydew: Limited supplies available.

Watermelon: Watermelon volume is very good out of California, Arizona, Texas, and the Carolinas. Quality is outstanding.

Mixed 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.*

Artichokes: Quality and Supply are good.

Asparagus: ESCALATED Peruvian and Mexican supplies have tightened rapidly in recent days, particularly on larger sizes such as XL and Jumbo. National demand has spiked, further straining availability. Weather-related challenges in Peru are expected to limit production over the coming weeks, and current Mexican volumes are not sufficient to offset the shortfall in larger fruit. As a result, prorates on XL and Jumbo are likely to occur. Markets have responded to both the reduced supply and increased demand, and elevated pricing is expected to persist in the near term. We are seeing a production gap until the end of July on White Asparagus.

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

Broccoli/Broccoli Crowns: Quality and supplies are improving. Insect pressure (diamond back moth) has been reported and is affecting yields. MX still has extreme shortages. The market is no longer escalated, but some growers are still holding to averages. Organic Broccoli is still triggered.

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

Brussels Sprouts: EXTREME Supplies are still very tight. Insect pressure and internal browning have been reported. Growers are holding to averages when they can, but we are seeing prorates from some of the larger growers. A Market Alert was sent out. One of the largest suppliers has wrapped up harvesting in Oxnard and MX. They are relying on Salinas to harvest 100% right now. We can expect to see light supplies for the next few weeks until they get settled in Salinas. The market is still at the Extreme Trigger.

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: Quality is good, but supplies are light with some growers. We're also seeing insect pressure, a little discoloration and creamy color. Organic Cauliflower is still triggered.

Celery: Quality and supplies are good right now.

Corn, Sweet: ESCALATED Markets remain strong as the summer transitions are underway in the east. In the west, Tracy and Brentwood are now in full production. We should see some improvement in supply and markets over the next ten days. 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. We have been seeing prorates.

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 okay. We have seen some reports of weak texture, discoloration, wilting, moderate wind damage and there has been some insect damage. We have also recently seen heavy mechanical damage due to brittle texture. The warm soil temperatures are leading to rapid growth.

Spring Mix: WATCHLIST Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. We have added this item to the watchlist.

Snow Peas and Sugar Snaps: WATCHLIST Guatemalan production remains light due to seasonal factors, while Peruvian supplies continue to be steady with overall good quality. Pricing has generally remained unchanged. Mexico has finished its season for both snow peas and sugar snaps, and domestic availability remains to be limited.

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.*

Tomato Suspension Agreement Update

As we continue to navigate the impacts of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties will be imposed on Mexican tomatoes, as growers were notified just Monday evening of the duties being retroactive. We are actively working with each grower partner to gather a breakdown of how duties will be applied for tomatoes imported from Mexico and will provide updates once we have completed the implementation process.

East Coast

- **Round and Roma Tomatoes:** Supply is slowly ramping up out of North Carolina and Tennessee. Current quality will be mixed due to weather but should improve with each harvest. Rounds volume should improve towards the end of next week while Romas are short, overall volume should improve over the next week.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Improving supply available as we emerge from fields that were impacted by rain. Quality is gradually improving.

Mexico

- **Round Tomatoes:** Volume will slowly improve over the next week, crossing through McAllen and Otay. Larger sizes are short; good supplies on 5X5-6X6's overall demand is mixed, and quality is excellent.

- **Roma Tomatoes:** Production is better this week out of Jalisco, San Luis Potosi and Baja. Quality remains good.
- **Snacking Tomatoes**
 - **Grape Tomatoes:** Good supply and weak demand have put downward pressure on price. Quality is good.
 - **Cherry Tomatoes:** Most of the volume seems to be crossing from the Baja; quality is very good. Demand is flat.
 - **Medley Mixed Tomatoes:** Lighter volume this week available through McAllen and Otay. Quality is mostly good.
- **Tomato on the Vine:** Stable volume available this week.

California

- Strong production out of the valley should continue for the month of July. Rounds are plentiful; Romas were short this week due to higher demand and priced much higher. Overall 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.