



Weekly Market Review August 14, 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 as well as an additional 5% reciprocal tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.

Post Suspension agreement demand continues to be very good for Mexican tomatoes going into the weekend, being the domestic supply is short once again this week due to weather in the east. Demand is very strong on the entire round category, putting upward pressure on FOB prices. Grape Tomato supply is good out of all regions as are other varieties in the snacking category. Roma demand is down this week and price is reflective. 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 and in the east weather. The tightest items continue to be Color Bell Pepper and Red Fresno 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. Overall avocado supply remains stable, with strong availability on medium and large fruit. Mexico's Loca crop is performing as expected, offering a good supply on 48ct and smaller, and with lower dry matter levels, it is holding well through the supply chain. Attention is shifting to the upcoming Aventajada crop, which is projected to bring ample volume and a return to a more balanced size curve, with increased availability of 48s and larger after several years of tighter supply. Industry recommendations to "size up" are expected to be common in Q4. California production is lighter this week due to lower demand and will continue to taper as the season winds down, with harvests anticipated through September and a presence in the market through October. Peru imports remain strong, with excellent availability on large and jumbo fruit, and will also remain in the market into October. Colombia's volume is currently light as its off-bloom crop finishes, with the main crop expected to arrive in November. This remains an ideal time to promote across all sizes and countries of origin. Temperatures in Salinas have warmed up. We are still seeing some supply and quality issues on a few commodities. Insect pressure and INSV have been reported in the fields for Lettuce, Romaine, Leafy Greens and Broccoli. Supplies continue to be light for a few items, and the Lettuce market is again on the rise due to limited supplies. We are still seeing lighter weights and lower yields due to smaller heads and increased insect pressure. Growers are covering averages for now, but quality is still good. The industry is expected to see lighter lettuce supplies for at least the next few weeks. Romaine Hearts and VA Romaine are still escalated. Fringe burn and INSV are present in some fields. Broccoli supplies have improved with the CA growers but we seeing heavy insect pressure, and the markets could start to react. MX growers still expect supply issues throughout the summer. Quality still seems to be good but with reports of increased insect pressure, quality issues could arise. Brussels Sprouts supplies are still tight, but quality and supplies are improving. The market is still at the extreme level but is trending down. Fennel/Anise is also still at the Extreme level. Supplies continue to be very tight. Sizing is small and growers are holding to 8–10-week averages. As of right now, it look like the market will stay limited for several weeks. Bok Choy, Napa, Endive, Escarole and Leeks remain escalated. School is back in session so demand will continue to increase. Summer always bring quality and supply issues, and we can expect things to be a bit of a roller coaster for the next few months. 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. Expect to transition into pink grapefruit within a couple of weeks. 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. 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 taper off around mid-September and conclude fully mid-October. Weather conditions remain favorable. District 3 is projected to begin in mid-September. 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 harvest is now underway in Mexico, with weekly shipments increasing from 15000 – 25,000 cases. While fruit is still maturing, sizing is trending toward 140s, 165s, and 200s, with grade currently leaning more toward Choice. Argentina continues to ship significant volume to Europe and Russia, with 5.1 million cases sent to Europe alone, a 75% increase over total volume shipped in 2024. Peak sizes remain between 95s, 115s, and 140s. While overall quality has improved compared to last season, it varies by supplier. U.S. shipments are expected to continue through mid-August, with roughly 85% of the crop now harvested. Chile has shipped close to 2.2 million boxes to the U.S. so far, with pack outs primarily being 115s, 140s, and 165s. Approximately 70–80% of the crop grade is Fancy. Total volume is projected to increase by about 5% over last year, reaching an estimated 21–22 million boxes. In recent weeks, Chile has averaged 115,000 – 175,000 cases per week into the U.S., with 70% of that headed to the East Coast. This pace is expected to continue as shipments to Asia and Europe remain strong. The California garlic crop has begun, and our partners are not currently taking on new volumes until they have a better idea of their crop. Please keep this in mind when adjusting commitments or requesting new volume!

Alert List

- Asparagus – **EXTREME**
- Bell Pepper: Red, Yellow and Orange – **EXTREME**
- Blackberries – **ESCALATED**
- Bok Choy – **ESCALATED**
- Brussel Sprouts – **EXTREME**
- Cilantro – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **EXTREME**
- Chile Peppers (Serrano and Red Fresno) – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce/VA Lettuce – **ESCALATED**
- Napa – **ESCALATED**

- White Asparagus
- Tomatoes (Rounds and Romas) – **ESCALATED**

1. Avocados
2. Broccolini
3. Broccoli
4. Cabbage
5. French Beans
6. Herbs
7. Lemons, Small Sizes
8. Limes
9. Pineapple

10. Ginger
11. Green Onions
12. Green Leaf & Red Leaf
13. Snow Peas & Sugar Snap Peas
14. Spinach
15. Spring Mix

SALINAS, CA

Thu 8/14	Fri 8/15	Sat 8/16	Sun 8/17	Mon 8/18	Tue 8/19	Wed 8/20	Thu 8/21
65° 58°F	69° 61°F	69° 59°F	68° 53°F	71° 54°F	71° 56°F	73° 56°F	73° 57°F
							
Cloudy	AM Clouds/PM	Mostly Cloudy	AM Clouds/PM	Sunny	Sunny	Sunny	Partly Cloudy

Thu 8/14	Fri 8/15	Sat 8/16	Sun 8/17	Mon 8/18	Tue 8/19	Wed 8/20	Thu 8/21
67° 59°F	70° 61°F	71° 62°F	69° 61°F	71° 60°F	73° 61°F	73° 62°F	74° 63°F
AM Clouds/PM	AM Clouds/PM	Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Mostly Sunny	Sunny

[illegible]

Thu 8/14	Fri 8/15	Sat 8/16	Sun 8/17	Mon 8/18	Tue 8/19	Wed 8/20	Thu 8/21
105° 82°F	100° 82°F	100° 81°F	102° 82°F	102° 83°F	107° 84°F	109° 85°F	110° 85°F
Mostly Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny

[illegible]

VIZCAINO, BAJA

Thu 8/14	Fri 8/15	Sat 8/16	Sun 8/17	Mon 8/18	Tue 8/19	Wed 8/20	Thu 8/21
87° 72°F	90° 73°F	91° 73°F	93° 73°F	94° 74°F	94° 75°F	95° 76°F	95° 75°F
							
Thunderstorms	PM Thunderstorms	Scattered Thunderstorms	Thunderstorms	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	Thunderstorms

LIBERTY, TN

Thu 8/14	Fri 8/15	Sat 8/16	Sun 8/17	Mon 8/18	Tue 8/19	Wed 8/20	Thu 8/21
90° 71°F	92° 70°F	93° 70°F	95° 71°F	97° 72°F	97° 72°F	91° 70°F	88° 69°F
							
Partly Cloudy	Partly Cloudy	Mostly Sunny	Sunny	Sunny	Mostly Sunny	PM Thunderstorms	Partly Cloudy

HENDERSONVILLE, NC

Thu 8/14	Fri 8/15	Sat 8/16	Sun 8/17	Mon 8/18	Tue 8/19	Wed 8/20	Thu 8/21
85° 70°F	86° 70°F	85° 66°F	88° 70°F	87° 67°F	83° 67°F	83° 67°F	80° 66°F
							
Isolated Thunderstorms	Partly Cloudy	AM Clouds/PM Sun	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	PM Thunderstorms

Fruits & Vegetables

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Avocados: WATCHLIST Last week closed at 62.3M pounds for the U.S. avocado industry, a 16% increase after two consecutive weeks of declines. Both California and Peru have reported actual volumes below projections in recent weeks, which will likely keep both origins in the market well into October. Jalisco currently accounts for 17.2% of Mexico's shipments, with the main crop averaging 38% dry matter and the Off-Bloom (Loca/Mendez) crop peaking on 48s and 60s at 25.1% dry matter. Mexico remains in crop transition, with 80.3% of harvest activity from Off-Bloom fruit and 10.7% from Main Bloom last week. Peru's campaign is approximately 83% complete, with more than 560,000 metric tons shipped globally, and quality arrivals continuing; program supply is expected to run for at least another month. California harvested approximately 5.6M pounds in week 32, with dry matter averaging 29% and sizing peaking on 48s and 60s. Harvest volume is tapering, quality remains excellent, and fruit is expected to be available through early fall.

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. We will see an additional 5% reciprocal tariff applied to this category over the coming weeks as the Federal Government implements additional tariffs to countries that have not finalized trade deals; this is still very fluid this week and will provide updates as soon as possible.

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. We will see an additional 5% reciprocal tariff applied to this category over the coming weeks as the Federal Government implements additional tariffs to countries that have not finalized trade deals; this is still very fluid this week and will provide updates as soon as possible.

Table Grapes: Now in full production out of California; quality and supply are stable on Flames, Sugraones and Ivory varieties.

Berries

Strawberries: Production continues to slow across the Salinas/Watsonville region as we move past peak volumes and into the seasonal decline. Overall volume is expected to continue dipping through August, with the Santa Maria and Oxnard fall crops set to begin in September. Quality remains good, though recent wet and foggy mornings have led to increased reports of bruising and decay. QA teams are staying vigilant, and harvest crews are removing sub-par fruit in the field to maintain premium pack standards. Fruit is showing full color, medium to large sizing, and continues to eat well.

Blackberries: ESCALATED Production is ongoing in both Central Mexico (CMEX) and Oxnard, with Oxnard expected to continue through early September. CMEX volume is projected to increase steadily heading into the fall. Production in Baja and Watsonville has not yet begun. Watsonville is set to start in a very limited way next week, with gradual increases expected, while Baja will begin in late August and run through mid to late September. Overall supply remains very limited, and quality varies by region. Some reports of softness, leakers, and color reversion (red cell) have been noted, though pack outs are still grading well overall. Demand is currently exceeding supply, and pricing is expected to remain elevated over the next several weeks until volume improves.

Raspberries: Production continues in Central Mexico (CMEX), Baja, and Watsonville, CA. Both CMEX and Baja are seeing steady production with good quality. In Watsonville, volumes are declining as the region moves into a seasonal supply gap, though a rebound in volume is expected by late August to early September. California raspberry quality remains excellent, with sweet, aromatic, full-red berries that are eating exceptionally well.

Blueberries: Production is ongoing in Central Mexico (CMEX), Oregon, and Washington. CMEX volume is expected to ramp up throughout August, while the Pacific Northwest regions are now past peak production. Rain is in the forecast for several growing areas in Oregon and Washington this weekend, which may impact quality. Early imports from Peru are anticipated in the coming weeks. Overall supply is steady, and quality remains very 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: WATCHLIST Supply is extremely tight this week on all sizes with larger sized fruit being the shortest. We expect to need to sub sizes next week for larger fruit as we start newer crop. Short term forecast is lighter supplies through Labor Day at the earliest.

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 is good, but supplies are limited. We are still seeing lighter weights and increased demand. There have been some reports of INSV. There is some light to moderate levels of Scalero, fusarium and thrip damage. There have been lower yields from the smaller framed lettuce heads and increased disease pressure in the fields. Some growers are holding to averages. The soil borne diseases has really limited the harvestable acres. The market is escalated and will likely be a roller coaster over the summer as growers try and navigate the issues with the yields.

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

Romaine & Romaine Hearts: ESCALATED 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. Romaine Hearts and Organic Hearts are all still escalated.

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

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

Eastern and Western Vegetables:

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Green Bell Pepper: Steady supply available from all growing regions Quality is good and will continue to improve 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 and Mexican production 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 continue over the next 10-14 days and recommend scaling portions for subbing green for color pepper where necessary while we navigate these shortages.

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

Mixed Chili Pepper: ESCALATED Supplies are generally good across most varieties out of Mainland Mexico, Baja and California this week. Serrano and Red Fresno are the tightest this week; Red Fresno being so tight for the coming weeks we recommend subbing to red jalapeno.

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

Slicer Cucumbers: Stable supply crossing through Otay and McAllen. Domestic supply was also stable out of North Carolina, Michigan and Tennessee. Quality is outstanding in the west and fair in the east.

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

Pickles: Light supply expected over the coming week out of Michigan and Tennessee. Quality is good.

Green Beans: Supply and quality were mixed this week, and demand was light as most growing regions deal with weather-related pressure.

French Beans: WATCHLIST Production remains strong out of Guatemala, though minor quality issues may occur due to heat and shipping delays. French bean supply from Mexico is fair.

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 and supply remain strong from Colombia and Mexico, while tarragon production continues to be light. Mint supply is beginning to decline due to weather, and imported chervil from Ecuador remains limited. In the West, basil supply and quality are also strong, with steady availability on most other herbs. Chervil and marjoram remain limited due to weather-related challenges, and overall herb quality may be inconsistent in some areas due to heat.

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; some 15's as well. 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; 8's are very limited. We do expect supply and sizing to remain stable for the next several weeks. Quality is excellent; 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: Good supply available on 5 and 6J's; quality is outstanding.

Watermelon: Watermelon volume is very good out of multiple districts including California, Arizona, Michigan, Illinois, North Carolina and Missouri. Quality is outstanding.

Mixed Vegetables

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Artichokes: Quality and Supply are good.

Asparagus: **EXTREME** Baja and Guanajuato, Mexico production remains low due to seasonal transitions, while cooler weather continues to limit Peruvian output as well as port delays. This trend is expected to persist until at least Labor Day. Sizing across all regions is predominantly small to standard, with very limited availability of larger fruit. Markets are extremely active as reduced supply and sizing constraints continue to drive demand.

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

Broccoli/Broccoli Crowns: **WATCHLIST** Quality and supplies are improving. Insect pressure (diamond back moth) has been reported and is affecting yields. The insect pressure is limiting harvest. 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 have improved. Insect pressure and internal browning have still been reported but quality is also starting to improve. We are also seeing some elongated stems due to the rapid growth from the heat. The market is still at the Extreme Trigger but is trending down. We should see things improve by the end of the month.

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 and supplies are good. Organic Cauliflower is escalated.

Celery: Quality and supplies are good right now.

Corn, Sweet: **ESCALATED** Markets are slowly easing back as newer districts start to ramp up production. We should see the gradual decrease in FOB pricing and more availability over the coming weeks. In the west, Tracy and Brentwood are now in full production. 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: The 2024-2025 California Garlic season is ending, and the California Garlic crop has begun, so you should expect to see some improvement in supply as they move into this harvest. Quality remains good although availability will be held to current commitments until the growers have had enough time to evaluate this crop.

Ginger: Supplies and market are steady.

Green Cabbage: **WATCHLIST** Supplies and quality look good, but we are seeing poor yields in the VA cabbage as growers are trying to limit the core in the finished product.

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): 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: 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 Quality on Guatemalan snow peas and sugar snaps remains consistent, with improved volume expected within 7 to 10 days, weather permitting. Peruvian production is steady, with fair quality. We continue to see port delays out of the east. Domestic supply of both snow peas and sugar snaps remains 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:

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. 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: ESCALATED** Supply is still very slow to improve due to weather out of North Carolina and Tennessee. Current quality will be mixed; several days of heat, rain and high humidity are causing several post-harvest issues days after the fruit is packed. We are hoping to see some improvement but desperately need a few days of consistent sunshine to one, dry out the fields and two provide much needed sunshine to promote maturation of the crop.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Lighter supply available as we emerge from fields that were impacted by rain. Quality is gradually improving.

Mexico

- **Round Tomatoes: ESCALATED** Volume will slowly improve over the next week, crossing through McAllen and Otay. Medium sizes are short as demand has increased due to a lack of domestic round supply this week. Quality is excellent.
- **Roma Tomatoes: ESCALATED** Production is steady 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

- Rounds and Romas: **ESCALATED** Lighter production and very high demand from the east have driven markets higher this week. 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, New York and Canada.

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.