



Weekly Market Review August 28, 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.*

Demand on Tomatoes continues to dip into Labor Day Weekend; this is a combination of more supply coming out of Tennessee and Virginia as well as Mexico is starting newer blocks. Rounds still seem to be hanging on a bit but there is too much fruit available and not enough interest. 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 was down slightly this week keeping FOB prices higher in the West. Production on Mixed Veg will continue to be challenging on Color Pepper but does seem to be easing off some. The tightest items continue to be Color Bell Pepper, Habanero and Red Fresno. Grape season is now in peak production; quality and supply are excellent, and we should see steady markets now through late October. Melon supply out of Firebaugh is starting to slow down slightly as we are now on the backside of the California deal; days are getting shorter, and local deals will wind down as well. Quality is outstanding. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. Pumpkins and Fall items will be available this week. Aventajada is now officially available for harvest out of Mexico, overlapping with the ongoing Loca crop and ensuring strong volume through the Fall. As California and Peru continue to taper, Mexico is well-positioned to meet increased demand without disruption. Since the start of Mexico's fiscal year on July 1st, which aligns with the beginning of the Loca harvest, total shipments are already tracking 33% ahead of last year's pace. Mexico is projecting to ship 2.3 billion pounds to the U.S. this season, up from 2.2 billion pounds last year, an increase of roughly 100 million pounds, or the equivalent of over 40 additional truckloads per week. This added volume, coupled with a more traditional size curve, supports continued market stability and expanded promotional opportunities. As long as growers remain willing to harvest at pricing levels not seen since 2022, the outlook remains full-steam-ahead for the remainder of 2025. Temperatures in Salinas for the remainder of this week and early next week will be warm. The warmer weather has brought on insect pressure and is causing rapid growth on some of the commodities. Insect pressure and INSV have been reported in the fields for Lettuce, Romaine, Leafy Greens and Broccoli. The Lettuce market remains at the extreme level due to limited supplies. We are still seeing lighter weights and lower yields due to smaller heads and increased insect pressure. You will notice that lettuce is less dense during this time. Growers are covering averages when they can. We have seen some prorate, 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. We are 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 quality and supplies are continuing to improve. The market is still escalated but it is continuing to trend down. Fennel/Anise are still at the Extreme level. Supplies continue to be very tight. Sizing is small and growers are holding to 8 to 10-week averages. As of right now, it looks like the market will stay limited for several weeks. Bok Choy, Napa, Endive, Escarole and Leeks remain escalated. Summer always brings quality and supply issues, and we can expect things to be a bit of a roller coaster for the next few months. The Valencia season is beginning to wind down for some shippers, while others expect to continue harvesting for another eight weeks. Overall, we are seeing a good supply of 113s and larger, with fewer 138s available. The quality and flavor profile of the fruit is still looking great overall. Be aware that some shippers may be looking to hold to averages in the coming weeks. Choice Grapefruit is readily available, but most growers are requiring ample lead time for Fancy Grapefruits. Expect to transition into Pink Grapefruit this week. As we push towards the end of District 2's season, things are continuing to remain tight on small Lemons (165 and up) and most shippers are continuing to hold to averages. Size structure is peaking at 140/115ct choice. District 3 will hopefully be our light at the end of the tunnel and will give some relief on this strain, but small lemons are projected to remain tight into October. You will have to load import fruit in the east for smaller sized lemons, which is still subject to availability. District 1 preliminary evaluations are underway, with an early October start anticipated for the season. District 2 is in its final two weeks of significant harvest, and overall fruit integrity has been strong this year. Seasonally cooler weather through the summer allowed fruit to remain on the trees longer than usual. Final clean-up picks are expected in early October. District 3 harvesting began this week in Coachella Valley. Fruit is showing good internal quality with medium to large sizing. Picking is expected to ramp up gradually through September, with a peak anticipated in late October. The global lemon market remains strained, and small fruit is extremely limited. In Mexico, early harvest is now underway, with weekly shipments climbing into the 20,000s and expected to increase substantially in the coming weeks. 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 100% 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 95% of the crop now harvested. Chile has shipped close to 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 is in full swing, 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 – **ESCALATED**
- Cilantro – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **EXTREME**
- Chile Peppers (Habanero and Red Fresno) – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce/VA Lettuce – **EXTREME**
- Napa – **ESCALATED**
- Romaine Hearts/VA Blends – **ESCALATED**
- White Asparagus

Watch List









1. Avocados
2. Broccolini
3. Broccoli
4. Cabbage
5. French Beans
6. Herbs
7. Lemons, Small Sizes
8. Limes (Large Sizes are short)
9. Pineapple
10. Ginger
11. Green Onions
12. Green Leaf & Red Leaf
13. Snow Peas & Sugar Snap Peas
14. Spinach
15. Spring Mix

Weather









SALINAS, CA

Thu 8/28	Fri 8/29	Sat 8/30	Sun 8/31	Mon 9/1	Tue 9/2	Wed 9/3	Thu 9/4
72° 55°F	72° 56°F	77° 57°F	78° 56°F	73° 57°F	73° 56°F	74° 58°F	75° 57°F
							
Sunny	Partly Cloudy	Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny









OXNARD, CA

Thu 8/28	Fri 8/29	Sat 8/30	Sun 8/31	Mon 9/1	Tue 9/2	Wed 9/3	Thu 9/4
78° 61°F	79° 62°F	78° 64°F	79° 64°F	80° 63°F	78° 63°F	76° 63°F	75° 63°F
							
Partly Cloudy	Sunny	Mostly Sunny	Mostly Sunny	Sunny	Partly Cloudy	Sunny	Mostly Sunny









FRESNO, CA

Thu 8/28	Fri 8/29	Sat 8/30	Sun 8/31	Mon 9/1	Tue 9/2	Wed 9/3	Thu 9/4
98° 66°F	98° 68°F	102° 70°F	103° 70°F	102° 68°F	102° 69°F	102° 72°F	103° 72°F
							
Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Sunny









HERMOSILLO, SONORA

Thu 8/28	Fri 8/29	Sat 8/30	Sun 8/31	Mon 9/1	Tue 9/2	Wed 9/3	Thu 9/4
104° 81°F	100° 81°F	102° 82°F	101° 82°F	100° 81°F	100° 80°F	97° 79°F	96° 78°F
							
Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	PM Thunderstorms	Scattered Thunderstorms	PM Thunderstorms









JALISCO, NAYARIT

Thu 8/28	Fri 8/29	Sat 8/30	Sun 8/31	Mon 9/1	Tue 9/2	Wed 9/3	Thu 9/4
83° 65°F	82° 66°F	83° 66°F	81° 66°F	82° 66°F	80° 65°F	81° 65°F	82° 65°F
							
Thunderstorms	PM Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms









VIZCAINO, BAJA

Thu 8/28	Fri 8/29	Sat 8/30	Sun 8/31	Mon 9/1	Tue 9/2	Wed 9/3	Thu 9/4
101° 77°F	97° 75°F	103° 76°F	103° 76°F	103° 77°F	103° 77°F	102° 77°F	99° 76°F
							
Isolated Thunderstorms	Partly Cloudy	Mostly Sunny	Mostly Sunny	Sunny	Sunny	Mostly Sunny	Mostly Sunny

LIBERTY, TN

Thu 8/28	Fri 8/29	Sat 8/30	Sun 8/31	Mon 9/1	Tue 9/2	Wed 9/3	Thu 9/4
82° 55°F	87° 58°F	86° 59°F	85° 61°F	81° 60°F	78° 61°F	82° 60°F	80° 55°F
							
Mostly Cloudy	Mostly Sunny	Sunny	Partly Cloudy	Scattered Thunderstorms	Scattered Thunderstorms	Isolated Thunderstorms	Scattered Thunderstorms

HENDERSONVILLE, NC

Thu 8/28	Fri 8/29	Sat 8/30	Sun 8/31	Mon 9/1	Tue 9/2	Wed 9/3	Thu 9/4
78° 56°F	81° 58°F	79° 58°F	77° 55°F	77° 55°F	77° 55°F	78° 59°F	83° 63°F
							
Partly Cloudy	Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny

Fruits & Vegetables

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Avocados: WATCHLIST The U.S. avocado industry closed last week at 61.5M pounds, with the slight decline attributed to reduced volume from Peru. Mexico has completed its crop transition, with over 99% of current harvest activity now coming from Off-Bloom (Loca/Mendez) fruit, which is averaging 26.3% dry matter and peaking on 48s and 60s. Jalisco currently accounts for 17.5% of Mexico's shipments to the U.S. Looking ahead, next week's projections remain unusually low, with volume expected to mirror current levels. California and Peru are both tapering off, though select sizes from each region will remain available through September. The 2025 Peruvian avocado campaign is approximately 90% complete, with more than 590,000 metric tons shipped globally. Volume continues to arrive in good quality, and programs that remain active, particularly for medium and large sizes, are expected to continue for a few more weeks. Approximately 6.1M pounds were harvested in week 34 from California. Dry matter is averaging 31%. Sizing continues to peak on 48s and 60s. Harvest volume has flattened out, though fruit quality remains excellent. Based on current harvest rates, California fruit is expected to remain available through October.

Bananas: Banana supply remains stable despite strong demand for school business rapidly ramping up. 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. 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 in Salinas and Watsonville is beginning to slow as the season moves past its peak and into the natural decline, with overall volumes expected to dip further through August. Warm daytime temperatures in Watsonville, combined with mild overnight lows, are preventing the fruit from firming, leading to increased bruising and over-ripeness. As a result, quality is declining, and estimates are dropping as crews discard more fruit to maintain clean packs. The Santa Maria fall crop has begun lightly, though early signs point to quality concerns such as misshapen fruit. Oxnard's fall crop is expected to start within the next couple of weeks. Overall, volume across regions is projected to remain low for the next few months.

Blackberries: ESCALATED Production is ongoing in both Central Mexico (CMEX) and Oxnard. Oxnard is expected to continue through early September, while CMEX will steadily increase volume each week heading into the fall. Baja and Watsonville have not yet started; Watsonville is scheduled to begin lightly next week and build weekly, while Baja is projected to ramp up between late August and mid-to-late September. Overall supplies have improved, though quality is variable by region, with some reports of soft or leaky fruit.

Raspberries: Production continues in Central Mexico (CMEX), Baja, and Watsonville. Both Central Mexico and Baja remain steady with strong quality. Watsonville volumes are declining as the region approaches a seasonal gap, with recovery expected by early September. California raspberry quality remains excellent, featuring sweet, aromatic, and fully red berries.

Blueberries: Production continues in Central Mexico (CMEX), Oregon, and Washington, though the Pacific Northwest has now moved past its peak. Early imports from Peru are expected to begin arriving in the coming weeks. Supply remains steady for now, but a sharp decline is anticipated as we transition into September and October. As a result, pricing is expected to rise, and overall availability will become more limited.

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 do expect to need to start subbing sizes next week for larger fruit as we start newer crop. Short term forecast is lighter supplies through Labor Day at the earliest and pricing is to continue an upward trend for the coming weeks.

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: EXTREME Lettuce quality is good, but supplies are limited. The market is still escalated but is gradually degreasing. We are still seeing lighter weights and increased demand. We are still seeing signs of INSV. There is some light to moderate levels of sclero, 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 and we have seen some prorates. Growers are also subbing labels to try and cover orders when possible. The soil borne diseases have really limited the harvestable acres. You will see smaller heads and they will not be as dense as they normally are. The market is very active and will 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 and we have seen some prorates.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine heart quality are okay, but supplies are light. The market is still trending higher due to increased demand. 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, 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 still escalated.

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

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 will remain steady on 11# all sizes and prices are starting to come down. 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 7-10 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. Habanero 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 Ota 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: Steady 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 steady overall, though minor quality concerns may arise due to recent heat and shipping delays. Supply of French beans out of Mexico is fair, with some variability expected depending on regional conditions and logistics.

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. Quality is good.

Herbs: WATCHLIST Basil quality and supply remain strong out of both Colombia and Mexico. Tarragon production continues to be light, and mint volumes are lower than normal due to recent weather challenges. Imported chervil from Ecuador remains limited, and supply on marjoram is also tight due to weather-related impacts. Out of the West, supply is steady across most herb varieties, though chervil and marjoram remain exceptions. Heat continues to pose a risk to overall herb quality, which may be inconsistent in some cases.

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

Overview: Cooler temperatures have slightly slowed down production. As we move closer to September, the higher volume peak weeks are now behind us as an industry. With regional melon deals starting to wind down we are seeing an increase in demand from the east.

Cantaloupe: Cantaloupe pricing has started to trend higher, especially on larger fruit. The primary sizing over the past week has been reg 9/12s with even some 15s being packed. This sizing profile should continue for the next 7-10 days. Overall quality remains strong. Netting has been consistent, and the shell color remains high. Internal quality has been very good with higher brix levels, mostly 14-16%, and we have had excellent eating fruit.

Honeydew: Honeydew production has started to taper off and size distribution is leaning heavy to 6's; 8's are very limited. Quality is excellent; mostly clean shell, we are seeing occasional scarring on these first picks. Brix levels on the dewes are mostly in the 13-15% range.

Golden Honeydew: Limited supply available and quality remains good.

Watermelon: Watermelon volume is very good out of multiple districts including California, Arizona, Michigan, Illinois, North Carolina and Missouri. Quality is outstanding. We should start to see a slowdown post-Labor Day as regions finish up for the season.

Mixed Vegetables

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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.

Artichokes: Quality and Supply are good.

Asparagus: EXTREME Baja production continues to be low due to transitions and seasonality. Peruvian production remains low due to cooler weather. We will continue this trend until at least Labor Day. Sizing from all regions is predominantly small and standard, with very few of the bigger sizes. Markets are extremely active with less supply and sizing issues.

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

Broccoli/Broccoli Crowns: WATCHLIST Quality is improving but supplies are limited with some growers. 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 not currently escalated but supplies issues could change that. Some growers are already holding to 10-week averages. Organic Broccoli is still triggered.

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

Brussels Sprouts: ESCALATED Supplies have improved. Insect pressure and internal browning continue to be 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 triggered but is trending down. We should see things continue improve as we get into September.

Carrots (JUMBOS, MEDIUMS and CELLOS): Growers are still harvesting in Monterey County and Kern County district. Supplies are steady and the size on jumbos is good right now. Quality is good and should get even better as growers move forward into Lancaster and Cuyama. They will harvest there through November. When we look at the MX carrots, MX carrot volumes are decreasing due to natural seasonality as well as local markets emerging from Canada this time of year. Production remains the strongest in Guanajuato and Puebla and will start to lean more to Puenla as the year progresses.

Cauliflower: Quality and supplies are good. Organic Cauliflower is escalated.

Celery: Quality and supplies are good right now.

Corn, Sweet: Markets are slowly easing back as newer districts start to ramp up production. Just in time for the Labor Day push! We should see the gradual decrease in fob pricing and more availability. 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. Some growers are holding to 8-week averages, but we have seen some 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: Lighter volume available due to transitions and production forecasts that were made below actual demand. 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 unchanged, though better volume is anticipated within the next week, depending on weather and container delays. Peruvian production continues at a steady pace, with quality rated as fair. Domestic supply is limited, with overall availability considered fair at best. Pricing remains elevated across all 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:

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East Coast

- **Round Tomatoes:** Supply slower to improve out of Alabama, North Carolina and Tennessee while new production starts in Virginia and New Jersey. 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.
- **Roma Tomatoes:** Volume is slow to start this week but that combined with a flush of fruit in Mexico and soft demand has pricing down this week. Quality is mixed in the east and Outstanding in Mexico.
- **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: Volume** is steady crossing through McAllen and Otay. Quality is excellent.
- **Roma Tomatoes:** Production is strong 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:** Improving production out of the East Valley and Gilroy this week. Crop conditions appear to be much stronger than central valley production. 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: Steady supply out of 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.