



Weekly Market Review October 16, 2025









Overview

We are well underway out of South Georgia; Zucchini, Bell Pepper Corn and Cucumber are all readily available. Local deals are wrapping up this week as cold temps and rain force growers to call it a season. Out West, Squash and Cucumber are ramping up out of Nogales; transition is going to be a bit more of a challenge due to the recent weather caused by Tropical Storms Pricilla and Raymond. Both storms brought rain and localized flooding to areas of the Baja and well as Sonora. We do expect to see delays as growers assess the impacts, expect to see firmer markets this week. Tomato production is also transitioning as we see South Georgia growers start to pick snacking tomatoes this week; rounds and Romas next week. Some areas of Florida are also doing clean up picks this week. Markets were much higher this week as volume declines across all markets. California production will most likely conclude this week due to weather. Grape season continues to be into excellent production and quality; we should see steady markets now through late October. Melon supply out of Firebaugh will see rain delays and will assess any damages on the remaining crop. We expect Yuma to start in the next ten days. Quality is outstanding. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes in particular. Mexico's crop is expected to continue with a more "normal" size distribution. This marks a shift from the previous two years, which saw a higher concentration of smaller fruit due to drought and weather challenges. **Foodservice: #2** availability continues to be limited on smaller sizes. Currently #2s account for only 14% of imports from Mexico. National retail promotions for last week increased by 46% for a total of 10,611 stores running Avocados on Ad. Mexico maintains the majority of the US market share throughout the year, and they are signaling a season to be confident in supply. In Colombia, the main season is very close to the beginning of harvest. This next crop is the largest from Colombia and will be available in the spring. With Peru and California exiting, Colombia's continued availability during the months when Mexico is the dominant source will support prolonged market stability into 2026. In the East, vessel delays are disrupting the movement of Guatemalan products, while ongoing weather challenges in Guatemala are further pressuring production and quality. As a result, availability remains affected for Snow Peas, Sugar Snap Peas, Baby Peeled Carrots, Colored Baby Peeled Carrots, and French Beans. The market continues to be very volatile right now. Sporadic weather combined with rain and hail in Salinas is causing many issues with crops. The hail and the rain have affected harvesting conditions. There are many days that the growers could not harvest due to the muddy field conditions. Growers are still seeing increased soil borne diseases and a large presence of insect pressure. The insect pressure and INSV along with the weather are all contributing factors to the decreased yields. The limited supplies are driving the market and commodities are escalating very quickly. Broccoli, Broccolini, Cauliflower, Lettuce, Romaine and Romaine Hearts markets are all extremely limited and the markets remain at the extreme level. You will see shortages on these items, and they will be very severe at times. We are seeing pin rot, brown bead, light weights, larvae, mildew and decay. Growers are holding to averages when they can but with the loss of acreage, holding to averages has become difficult and the growers are just getting out what they can. The Diamond back moth is still very active and is expected to affect supplies throughout the Salinas season. Brussels sprouts quality is okay, but supplies are still extremely tight. Growers are still holding to very strict averages. The market is still at the extreme level and that is being driven by low yields. We can expect the light supplies to continue through, at least, the end of the month and possibly through November with the holiday pulls coming into play. Fennel/Anise are still escalated. Supplies are still a bit light. Artichokes also remain escalated. The smaller sizes are still at the extreme level. Sizing is small and growers are holding to strict averages. Bok Choy, Celery, and Cabbage all remain escalated. Growers are seeing increased demand and decreased supplies. Celery has very light supplies. With the holidays and football season upon us, we expect to see that market stay firm. Cabbage supplies have also gotten very light. Growers are holding to averages when they can, but you will likely see shortages. Boston/Butter Lettuce, Red Leaf, Green Leaf and Green Onions are all now at the Extreme Trigger with very light supplies. Fall is bringing very significant quality and supply issues. Rain and hail have only added to these issues. We can expect things to be very challenging for the next month as we get closer to transition. Disruptions in supplies should be expected. Yuma has also experienced rain and unusual weather patterns, so transition is expected to be bumpy. We will likely see gaps in the supply chain. We will keep an eye on the weather and continue to send out updates and information as we receive it. The Valencia season is beginning to wind down as we continue into Fall and Navels are beginning to ramp back up. Navels are projected to be overall larger this season, with smaller fruit remaining tight into 2026. As of now, some suppliers are not anticipating a gap while transitioning to Navels, while others are having a gap in supplies. Please remain in close contact with your supplier on this matter and be sure to give ample lead time on orders so you can plan accordingly. The quality and flavor profile of the fruit is still looking great overall. Be aware that most shippers are holding averages on Valencia's. CA Pink Grapefruit is projected to go through mid-October. Texas/Desert Rio Grapefruit will begin slowly in mid-October and ramp up as we head into December. Availability will be tighter in October for grapefruit and then open back up in late November/December. Things are continuing to remain tight on small Lemons (165 and up) and most shippers are continuing to hold to averages, with anticipation of better supplies in the next few weeks. Size structure is peaking at 140/115ct choice in District 3. Fruit is showing good internal quality with medium to large sizing. Picking is expected to peak in late October. District 1 preliminary evaluations are underway, with an early October start anticipated for the season. Imported product is due to wrap up in early October. California Mandarins are anticipated to start in November and California Cara Caras and Bloods will ramp up in December. The California Garlic crop is in full swing, and supplies are good.









Alert List

- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Blackberries – **ESCALATED**
- Bok Choy – **ESCALATED**
- Boston/Butter Lettuce – **EXTREME**
- Broccoli Florets/Crowns/Asian Cut – **EXTREME**
- Broccolini – **EXTREME**
- Brussels Sprouts – **EXTREME**
- Cabbage, Green/Shredded – **ESCALATED**
- Cauliflower – **EXTREME**
- Celery/Celery Sleeved – **ESCALATED**
- Cilantro – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Green Leaf – **EXTREME**









JALISCO, NAYARIT

Thu 10/16	Fri 10/17	Sat 10/18	Sun 10/19	Mon 10/20	Tue 10/21	Wed 10/22	Thu 10/23
79° 63°F	79° 65°F	81° 67°F	83° 67°F	82° 66°F	83° 66°F	84° 67°F	83° 65°F
							
Scattered	PM	Isolated	PM	PM	PM	PM	Isolated
Thunderstorms 12 AM - .36 in	Thunderstorms 0.15 in	Thunderstorms 0.01 in	Thunderstorms 0.04 in	Thunderstorms 0.07 in	Thunderstorms 0.02 in	Thunderstorms 0.02 in	Thunderstorms 0.02 in









VIZCAINO, BAJA

Thu 10/16	Fri 10/17	Sat 10/18	Sun 10/19	Mon 10/20	Tue 10/21	Wed 10/22	Thu 10/23
87° 71°F	90° 71°F	92° 72°F	94° 73°F	93° 73°F	94° 72°F	94° 72°F	94° 72°F
							
PM	Partly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny	Sunny
Thunderstorms	-	-	-	-	-	-	-

QUINCY, FL

Thu 10/16	Fri 10/17	Sat 10/18	Sun 10/19	Mon 10/20	Tue 10/21	Wed 10/22	Thu 10/23
89° 60°F	87° 57°F	87° 61°F	84° 57°F	83° 53°F	88° 59°F	81° 51°F	81° 49°F
							
Sunny	Mostly Sunny	Sunny	PM Showers	Sunny	Sunny	Sunny	Mostly Sunny
0 in	0 in	0 in	0.03 in	0 in	0 in	0 in	5 AM 0 in

LAKE PARK, GA

Thu 10/16	Fri 10/17	Sat 10/18	Sun 10/19	Mon 10/20	Tue 10/21	Wed 10/22	Thu 10/23
85° 57°F	82° 53°F	83° 58°F	83° 58°F	80° 52°F	84° 58°F	79° 51°F	79° 49°F
							
Sunny	Sunny	Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny
0 in	0 in	0 in	0 in	0 in	0 in	0 in	0 in

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 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.*

Avocados: Last week, avocado volume closed at 58.3M pounds for the US, back to stable volume. Mexico's crop is expected to continue with a more "normal" size distribution. Jalisco currently accounts for 11.5% of Mexico's shipments to the U.S. The Main Crop is averaging 26.7% dry matter, while the Off-Bloom (Loca/Mendez) Crop averages 27.2%. The Main Crop continues to ramp up, now representing about 36.5% of total harvest volume. As programs transitioned back to Mexico, the industry has done a good job sizing up programs to balance demand with what is harvested off the trees. The market has now stabilized on larger sizes, and overall volumes remain plentiful to continue promotions. The close of the California season will continue to be slow and steady. It's been a strong season for California, but volume will finish under projections. Sizing continues to peak on 48s and 60s.

Bananas: Banana supply remains stable despite strong demand for school business rapidly ramping up. Overall, banana quality has been very good.

Pineapples: WATCHLIST Pineapples will remain very short over the next 14 months at best due to low production in Central America brought on by drought, poor production and loss of acreage. Our contracts continue to maintain their integrity; however, we will need to remain flexible regarding sizes to ensure the stability of the supply chain. Overall quality and taste are good.

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

Berries

Strawberries: ESCALATED Industry supplies remain extremely limited, and a long-term shortage is expected, with no major improvement anticipated before December. The next five to seven weeks will be particularly challenging as supply remains tight and pricing continues above normal seasonal levels. Oxnard crops have recovered well following recent weather, producing fruit in the low-to-mid 20s with excellent color, sheen, and flavor, and only minimal reports of green shoulders. Central Mexico (CMEX) production is increasing week over week and will become a more significant factor by late October. Quality is good overall, though crossings remain limited. Santa Maria production has also improved, but still shows some bruising and overripeness, while Salinas and Watsonville are nearing the end of their seasons. Fruit from these northern districts is showing signs of fatigue, including shorter shelf life, bruising, and occasional decay. All growing regions have received rainfall this week, which is likely to end production in the northernmost regions and could significantly reduce or conclude Santa Maria's season as well.

Blackberries: ESCALATED Production remains active in both Central Mexico (CMEX) and Baja, with weekly volume increasing as the fall season progresses. Overall, supplies have improved; however, quality remains variable across regions, with isolated reports of color reversion and some soft or overripe fruit due to recent heat, rain, and humidity. Rain is forecasted in CMEX this week, and daily inbound volumes have already declined as harvest activity slows. Supplies are expected to tighten in the near term, and market levels are trending upward.

Raspberries: Production continues across Central Mexico (CMEX), Baja, Oxnard, and Watsonville, California, with steady volumes reported from all regions. Overall quality remains good, though some lots are showing minor softness or over ripeness related to recent heat, rain, and humidity in the growing areas.

Blueberries: WATCHLIST Production continues in Central Mexico (CMEX), with supplies remaining tight and expected to stay that way through October. Quality has been strong, with firm fruit, good bloom, and excellent sizing. Shipments from Peru remain delayed, though additional volume is anticipated by mid to late October.

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 start subbing sizes anytime soon for the larger side of the scale as old crop available continues to decline. The short-term forecast is lighter supplies through September, 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 fair, but supplies are extremely tight. Growers are holding to averages. We are still seeing signs of INSV, lighter weights and ribby lettuce. With more rain in the forecast, we expect some production gaps over the next few weeks. Growers are holding to strict averages when they can, but you should expect to see prorates. The market is still very active. The weather has affected harvesting and quality. This is causing additional supply issues.

Iceberg VA: EXTREME Quality is fair, and supplies are tight. Growers are holding to averages and prorates should be expected. The weather has affected harvesting and quality. This is causing additional supply issues.

Romaine & Romaine Hearts: EXTREME Romaine and Romaine heart quality are okay, but supplies are extremely tight. The market is still trending higher due to increased demand. There have been reports of bruising, mechanical damage, lightweights, fringe burns and light cupping. Insect pressure and sclero/INSV have also been reported. Growers are holding to averages when they can but prorates should be expected. The weather has affected harvesting and quality. This is causing additional supply issues.

Romaine VA: EXTREME Quality is okay, and supplies are extremely limited. Growers are holding to averages when they can but prorates should be expected. The weather has affected harvesting and quality. This is causing additional supply issues.

Boston/Butter Lettuce: **EXTREME** Quality is okay but supplies extremely are tight. We have seen mildew and fringe burn pressure. The weather has affected harvesting and quality. This is causing additional supply issues.

Green Leaf, Better Burger and Red Leaf: EXTREME Quality is okay, but supplies are extremely tight. Prorates should be expected. We have seen mildew and fringe burn pressure. We are also seeing lighter carton weights. The weather has affected harvesting and quality. This is causing additional supply issues.

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 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.*

Green Bell Pepper: Steady supply available from all growing regions Quality is good.

Color Bell Pepper: Steady supply available from all growing regions Quality is good.

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

Mixed Chili Pepper: **ESCALATED** Supplies were lighter this week as this week’s rain has caused harvest delays and ongoing quality issues on several varieties. We expect to see some volatility through mid-December when we start production out of Sinaloa. Red Fresno was the tightest this week and we are recommending Red Fresno consider a sub to red jalapeno when needed.

Eggplant: Domestic supply is steady out of Fresno; the local summer deals should wrap up this week and move to South Georgia over the next 2 weeks. Quality is good. Mexico crossings will ramp up this week.

Slicer Cucumbers: Supply crossing through Otay, Nogales and McAllen may be lighter this week due to harvest delays caused by this week’s weather in Baja and Sonora. Domestic supply was also stable out of South Georgia. Quality is good out of all growing regions this week.

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

Pickles: Light supply expected over the coming week out of Canada, Michigan and Tennessee. Mexico should start ramping up over the coming weeks. Quality remains strong domestically and the fields in Mexico show good development to date.

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 good, but minor quality issues may be present due to heat, rain, and shipping delays. There is a fair supply of French beans from Mexico.

Zucchini/Yellow Squash: **WATCHLIST** Supply in the west will be tighter this week as summer production out of California slows down and starts transitioning to Nogales. We will need to assess the impacts of the tropical disturbances that hit Sonora over the weekend. In the east, the local deals out of the north will most likely call it a season due to cooler weather and move to South Georgia. Overall quality is very good. New Crop Hard Squash is available for Fall promotions.

Herbs: **WATCHLIST** Basil production remains strong out of Colombia and Mexico, though some quality issues have been observed due to field heat. Tarragon production has returned to normal levels. Imported chervil supply has slowed as weather conditions in Ecuador continue to impact harvest and export volume.

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: Both growing regions have been hit with significant weather since last Friday. Yuma experienced rain between Friday and Saturday while the Firebaugh district saw rain last night through tonight as well as cold temperatures and overcast conditions. Firebaugh was expected to finish harvesting on Friday, but it is unclear when they will be able to get into the fields. Yuma is now harvesting cantaloupes and will start honeydews next week. With rain falling in both locations, and all melons being field packed, fruit will be cleaned as best as possible, but the reality is to expect dirt/mud on the cantaloupe and honeydew as this will be unavoidable.

Cantaloupe: Production in Firebaugh will be light due to the rain and will most likely lead to the end of the season. It will be difficult to pack with the amount of mud in the fields. Yuma harvest has started with the size profile peaking on 6ct, and very light on 12ct. Flexibility of sizing may be required when loading. Overall quality remains at optimum levels – great size, good color and flavorful internal quality.

Honeydew: There will be a better opportunity to pack honeydew in Firebaugh over the weekend. Shippers are hoping to gain access to the honeydew fields in Yuma on Monday, allowing for some mixer volume available to load. Flexibility of sizing could be required as the size profile is not yet known for Yuma. The long-term forecast for honeydew is questionable as the Mexican growing region of Hermosillo experienced substantial rains three weeks ago which will likely impact the start of that program which is scheduled to begin the second week of October.

Watermelon: Watermelon volume has started to firm up as local deals wind down for the season. Still seeing fruit available in several districts but that will gradually decline as the weather cools across the country. Quality remains strong.

Mixed Vegetables

Artichokes: ESCALATED Quality is good, but supplies are limited. Growers are holding to averages and there may be some substitutions on sizes. Large sizes are extremely tight.

Asparagus: ESCALATED Baja production continues to be very low due to field transitions from the north to the south and the impact of rainfall. Peruvian volume and sizing continue to improve. Markets are very active out of the west with less Mexican product, and slightly better markets out of the east due to Peru starting to have better volume. Peruvian arrivals continue to see delays due to mechanical issues with the shipping line. Expect higher markets with more air-freight products due to the vessel delays.

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

Broccoli Florets/Broccoli Crowns: EXTREME Quality is fair, supplies are still extremely limited. Yields are decreasing. The insect pressure has limited harvest. The market is at the extreme level. We have had reports of Browning, Pin Rot and Larvae from the insects. Most growers are prorating. No one is able to hold to averages. Broccoli is at a severe level. The weather has affected harvesting and quality. This is causing additional supply issues.

Broccolini and Sweet Baby Broccoli: EXTREME Quality is fair, and supplies are extremely tight on this item. Growers are prorating. Some growers are only covering 50% of 10-week averages. Pricing is at the extreme level. The weather has affected harvesting and quality. This is causing additional supply issues.

Brussels Sprouts: EXTREME Supplies are extremely limited. We still have some growers struggling with yields and growers who pulled early from their fields to cover orders over the past few weeks are now having to wait for the new crops to catch up to demand. Insect pressure and internal browning continue to be reported but the quality looks okay. The market is still at the extreme trigger. Growers are holding to averages.

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 Puebla as the year progresses.

Cauliflower: EXTREME Quality is fair, and supplies are extremely tight. Growers are battling insect pressure, and they are holding to averages. Some growers have started to prorate, and the market is still at the extreme level. The weather has affected harvesting and quality. This is causing additional supply issues.

Celery: ESCALATED Quality is good, but supplies are extremely tight. As we head into the Fall pull, the market prices are trending upward. Demand has risen due to schools starting back up and with football season in full swing. All Celery is escalated.

Corn, Sweet: Steady supply in the west as well as South Georgia. Markets eased back this week and should see a smooth transition continue. Quality remains good but we will start to see some maturity issues on the local crops such as smaller ear size and kernel size will decrease once we settle into the fall production regions.

Fennel: ESCALATED 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: WATCHLIST Supplies are limited, and quality is okay.

Leeks: Quality and supplies look good.

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: ESCALATED Supplies are extremely tight, and quality is okay. We are seeing poor yields in the VA cabbage as growers are trying to limit the core in the finished product. Growers are starting to hold to averages. The weather has affected harvesting and quality. This is causing additional supply issues.

Green Onions: ESCALATED Supplies are very inconsistent. Quality looks okay.

Mushrooms: Lighter volume available as the summer production winds down; overall forecasts are below expectations and demand is higher. We are quickly approaching that time of year when holiday pull at retail makes supply very short. Quality is good.

Napa Cabbage: 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: WATCHLIST Quality looks good, but supplies are light.

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 weather has affected harvesting and quality. This is causing additional supply issues.

Spring Mix: WATCHLIST Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. The weather has affected harvesting and quality. This is causing additional supply issues.

Snow Peas and Sugar Snaps: ESCALATED Supplies from Guatemala remain limited due to adverse weather, and quality is reported as fair. Peruvian production is slowing as the season winds down and market conditions soften. Domestic availability is also low following recent rainfall, keeping overall supply tight. Prices remain elevated on both coasts, with limited short-term relief expected.

Onions:

The onion market is expected to remain stable throughout Q4. With harvest concluding, all product will ship exclusively from storage in the Pacific Northwest. While we may see a modest increase occur, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

Potatoes:

Potato supply in for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. Burbanks will begin to ship in limited volume in mid-October, though Norkotahs will continue to make up the majority of the supply. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

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 - WATCHLIST

- **Round and Roma Tomatoes:** Supply from the east is lighter this week as we start the transition from the local summer production areas to South Georgia and Florida for the early fall season. Current quality will be mixed but will improve as volume increases in the new fields. Volume should increase over the next ten days.
- **Snacking Tomatoes (Cherry, Grape and Medley):** AMPLE supply available out of the summer programs, we will start transitioning to South Georgia and Florida over the next week. Quality is outstanding!

Mexico - WATCHLIST

- **Round and Roma Tomatoes:** Volume is steady crossing through McAllen and Otay. Quality at all border crossings will be mixed this week. We are challenged due to weather impacts from Tropical Storm Raymond as well as transition. We expect to see this recover over the next seven days as production does ramp up and will add to current crossings.
- **Snacking Tomatoes:**
 - **Grape Tomatoes:** Excellent 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:** Good supply crossing through McAllen and Otay. Quality is mostly good.
 - **Tomato on the Vine:** Stable volume available this week.

California - WATCHLIST

- **Rounds and Romas:** We experienced rain in the Central part of the state and expect to see some limitations to harvesting. We expect to wrap up the season over the next week. Quality is mixed.

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: New crop available out of California.

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

Cherries: Done for the season.

Stone Fruit: Done for the season.

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

Quince: Limited supply available this week.