



Weekly Market Review October 23, 2025

Overview

We are well underway out of South Georgia; Zucchini, Bell Pepper Corn and Cucumber are all readily available. 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. Tomato production is also transitioning as we see South Georgia growers starting 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 with lighter volume coming out of all regions. California production will 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 is mostly done with production moving to Yuma, however, rain and low yields have supplies tight. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes in particular. Industry supply is stable with attractive pricing on all sizes. Demand has seen a notable uptick, driven by robust retail promotions nationwide. Expectations are for the market to continue firming up as Mexico reestablishes market share dominance, and football promotions increase demand. Over 64 million pounds of avocados were harvested last week as Mexico's strong production is set to continue. Both the Main Crop and the Off-Bloom are averaging dry matter levels of 27.2%. Standing inventories in the US remain stable at 56.3 Mil lbs. The California season is nearly complete, with minimal harvest expected throughout October. An attractive Mexican price point and strong European pull will keep Colombia fruit low in the US for now. 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. Rainfall last week has significantly disrupted strawberry field conditions, fruit quality, and harvest schedules across Watsonville, Salinas, Oxnard, and Santa Maria. The back-to-back weeks of rainfall have prevented fruit conditions from improving. Cooler temperatures have slowed ripening, and some growers are reporting cull rates exceeding 50% in certain blocks. Additionally, the lingering moisture is expected to trigger new decay and pin rot as fruit continues to mature. Quality concerns are emerging in younger fruit sets, including shape issues, green shoulders, and smaller sizing. We should expect continued volatility in both supply and quality in the coming weeks as growers work to recover and stabilize production. Transition is a few weeks away and the market continues to be very volatile. Sporadic weather combined with rain and hail in Salinas is continuing to cause many issues with crops. The hail and the rain has affected harvesting conditions and quality. 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 still escalating. 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 when they can, but we have seen some prorates. 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, Green Onions and Cabbage all remain escalated, and we have added Spring Mix, Arugula and Spinach to the escalated market. Growers are seeing increased demand and decreased supplies. Celery also 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 and Green Leaf remain at the Extreme Trigger with very light supplies. Fall is continuing to bring 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. Be prepared to sub for larger sizes. 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 be finishing up. Texas/Desert Rio Grapefruit has begun slowly in and will continue to 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. District 1 experienced beneficial rain last week. Suppliers continue to evaluate the crop, with harvest expected to begin in late October. Fruit sizing is trending medium to large and is grading well overall. The last of the District 2 crop has been sold. We anticipate a strong, clean harvest next week. Conditions remain favorable, though there's still a long autumn and winter ahead. Crews in district 3 are picking at full speed, and the crop is looking clean with a high percentage of Fancy grade fruit. Harvest is expected to continue steadily and wrap up by December 31. California Mandarins are anticipated to start in November and California Cara Caras and Bloods will ramp up in December. The California Garlic crop reports that supplies are good.

Alert List

- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Arugula – **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**
- Green Onions – **ESCALATED**
- Hot Pepper, Jalapeno, Serrano, Caribe and Red Fresno – **ESCALATED**
- Kale – **ESCALATED**
- Leeks – **ESCALATED**

- Lettuce Iceberg – **EXTREME**
- Lettuce VA Blends/Better Burger – **EXTREME**
- Napa – **ESCALATED**
- Red Leaf – **EXTREME**
- Romaine/VA Blends – **EXTREME**
- Romaine Hearts – **EXTREME**
- Snow Peas & Sugar Snap Peas – **ESCALATED**
- Spring Mix – **ESCALATED**
- Spinach – **ESCALATED**
- Strawberries – **ESCALATED**
- Tomatoes- Romas – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List

1. Blueberries
2. Cabbage, Red
3. French Beans
4. Herbs
5. Lemons, Small Sizes
6. Limes (Large Sizes are short)
7. Pineapple
8. Ginger
9. Squash - West Coast
10. Melons - Cantaloupe and Honeydew

Weather SALINAS, CA

Thu 10/23	Fri 10/24	Sat 10/25	Sun 10/26	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30
68° 50°F	67° 54°F	65° 53°F	66° 50°F	70° 50°F	75° 54°F	77° 54°F	72° 51°F
							
Mostly Sunny	AM Fog/PM Sun	Cloudy	Cloudy	Partly Cloudy	Sunny	Partly Cloudy	Partly Cloudy

OXNARD, CA

Thu 10/23	Fri 10/24	Sat 10/25	Sun 10/26	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30
71° 55°F	70° 55°F	68° 55°F	70° 56°F	72° 58°F	78° 61°F	79° 60°F	76° 58°F
							
Mostly Sunny	Partly Cloudy	Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Partly Cloudy

COACHELLA, CA

Thu 10/23	Fri 10/24	Sat 10/25	Sun 10/26	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30
92° 62°F	95° 58°F	92° 61°F	91° 62°F	92° 63°F	95° 65°F	96° 65°F	95° 65°F
							
Sunny	Sunny	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny

HERMOSILLO, SONORA

Thu 10/23	Fri 10/24	Sat 10/25	Sun 10/26	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30
96° 63°F	93° 63°F	94° 63°F	97° 64°F	99° 66°F	100° 67°F	101° 69°F	98° 67°F
							
Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny

JALISCO, NAYARIT

Thu 10/23	Fri 10/24	Sat 10/25	Sun 10/26	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30
82° 63°F	81° 62°F	82° 60°F	82° 60°F	83° 60°F	83° 61°F	84° 62°F	83° 61°F
							
Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny

VIZCAINO, BAJA

Thu 10/23	Fri 10/24	Sat 10/25	Sun 10/26	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30
91° 55°F	92° 61°F	93° 61°F	93° 59°F	92° 62°F	97° 66°F	98° 67°F	95° 64°F
							
Sunny	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Mostly Sunny

QUINCY, FL

Thu 10/23	Fri 10/24	Sat 10/25	Sun 10/26	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30
83° 48°F	85° 53°F	83° 60°F	81° 65°F	79° 59°F	75° 56°F	78° 48°F	70° 45°F
							
Mostly Sunny	Sunny	Partly Cloudy	PM Showers	AM Showers	Partly Cloudy	Partly Cloudy	Sunny

LAKE PARK, GA

Thu 10/23	Fri 10/24	Sat 10/25	Sun 10/26	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30
79° 45°F	82° 51°F	80° 59°F	79° 65°F	75° 59°F	70° 56°F	74° 49°F	68° 45°F
							
Sunny	Sunny	Mostly Sunny	Mostly Cloudy	Showers	Partly Cloudy	AM Showers	Mostly Sunny

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: A 64.7M pound harvest was reported for week 42 (a 10% increase from the previous week), with 27.5M pounds shipped to the U.S. Jalisco currently accounts for 13.1% of Mexico's shipments to the U.S. Both the Main Crop and the Off-Bloom are averaging dry matter levels of 27.2%. The size curves for both crops are consistent, peaking at 48s and 60s. Due to the rain during this time of the season, there is an increased presence of Lenticel. Lenticel is small brown spots that develop on the skin after harvest, especially during the rainy season. The Main Crop continues to ramp up, now representing about 53.7% of total harvest volume. APEAM has released updated projections, estimating a 12% increase in total crop volume, translating to roughly 2.9 billion pounds, potentially matching or surpassing Mexico's record 2020–2021 crop year. Additionally, APEAM continues to enforce its dry matter standard, now releasing fruit for harvest at a minimum average of 23%. Approximately 2M pounds were harvested in week 41 from California. Sizing continues to peak on 48s and 60s. The California season is nearly complete, with minimal harvest expected through November.

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, the quality and taste are good.

Table Grapes: Fall production continues out of California, and demand has been steady. Quality has been mixed due to recent rains; those that have covered their crops are seeing less issues over fruit that has not been covered such as splits on reds, greens are starting to see issues like waterberry, ambering, and smaller sizing. Varieties available currently: Green-Autumn Kings, Autumn Crisp. Red Varieties- Autumn Royals, Scarlets, Globes. Blacks- Sweet Sapphire. We expect to be into storage fruit by the second week of November.

Berries

Strawberries: ESCALATED Rainfall last week disrupted field conditions across Santa Maria, Oxnard, Watsonville, and Salinas, leaving many areas wet and difficult to access. In Santa Maria, cooler temperatures during the rain helped reduce immediate damage, but the upcoming warmer weather may accelerate fruit breakdown and complicate recovery. Growers have begun culling and cleanup where possible, though several fields remain too muddy for full access. Early observations show limited visible fruit damage, but the risk of decay and pin rot remains high as conditions stay humid. Fruit sizing is trending smaller, with visible shape issues and green shoulders in both conventional and organic fruit. Overall production is moving into a post-peak phase, and while green fruit sets and flower counts are still strong, sustained volume will depend on managing lygus and decay pressure. Labor remains steady as crews balance harvest and new plantings, with Plant Science variety plantings continuing through October. In Watsonville and Salinas, rainfall left fields saturated, slowing harvest operations and contributing to heavy culling, with more than half of the fruit in some lots removed due to damage. Cooler weather over the next several days is expected to delay ripening, keeping volume inconsistent as growers complete cleanup rounds. Meanwhile, in Mexico, improving weather and lower rainfall are expected to support a gradual recovery in fruit quality and production, though volumes remain light and quality variable at this early stage of the season. Overall relief is not expected for another 4-6 weeks.

Blackberries: ESCALATED Production remains active in both Central Mexico (CMEX) and Baja, with weekly volumes steadily increasing as the regions ramp up for the fall season. Overall supplies have improved, though quality continues to vary between growing areas. Some lots are experiencing color reversion and uneven ripening, largely influenced by recent weather patterns. Heat, rainfall, and persistent humidity have led to occasional soft and overripe fruit, particularly in lower-elevation districts. Growers are working to tighten quality controls and adjust harvest timing to maintain consistency. Despite these challenges, field conditions are improving, and the overall outlook for supply remains favorable heading into the next several weeks.

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 improving out of Mexico slightly. However, supplies are steadying with more arrivals from Peru to help overall supply in the industry. Mexico's quality and sizing have been 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 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 October, 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 prorating. At times the prorates are extreme. 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. The market is still very active. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Iceberg VA: EXTREME Quality is fair, and supplies are tight. Growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Romaine & Romaine Hearts: EXTREME Romaine and Romaine heart quality are fair, 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. For the hearts, we are seeing very little heart material. Growers are prorating. The prorates can be extreme. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Romaine VA: EXTREME Quality is okay, and supplies are extremely limited. Growers are prorating. The prorates can be extreme. should be expected. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

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. Yields will continue to decrease as we get closer to transition.

Green Leaf, Better Burger and Red Leaf: EXTREME Quality is fair, and 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. Jalapeno, Serrano, Caribe and Red Fresno were the tightest this week. With respect to Red Fresno 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 is light on both coasts on in the west will be tighter this week as summer production out of California slows down and starts transitioning to Nogales. 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: Rain in California last week prevented suppliers from harvesting the last of their fields for several days as equipment got stuck in the mud for three days. Some were able to get California is now officially done will the focus on Yuma until imports start next month. Suppliers were able to get into the fields in Yuma, but there are concerns of lower yields and the potential of a virus. They are mentoring the situation closely. With California finishing early and low yield in Yuma, the next 3-5 weeks will be challenging. Ample lean time and flexibility will be key during this transition.

Cantaloupe: Sizing on new cantaloupe in Yuma initially was peaking on mostly jumbo fruit with a very small percentage (less than 2%) being 12s. Quality has been surprisingly good following the rain, but additional effort has been required to wipe down melons as best as possible. Remnants of mud/dirt are to be expected as it is inevitable to have a presence. Melons have been firm to hard with solid brix levels in the 11-14% range. Flexibility of sizing may be required at time of loading dependent upon what the fields provide that day.

Honeydew: Honeydew production currently is extremely limited. Fewer domestic dewes are planted during the fall period because of weather volatility in the region with more of a reliance on Mexican imports. Crossings through Nogales have been very limited so far this season, but it is expected to increase hopefully in the coming days to relieve some of the pressure in the market. Scarring is a common characteristic at this time of the year, and mud/dirt will also be seen. Sizing has been almost exclusively 5/5Js with 6s being mostly non-existent. Flexibility of sizing may be required at time of loading.

Watermelon: Domestic watermelons can be found on both coasts; however, there is an upward trend in prices due to a decrease in supply. The supply of Mexican watermelons via Texas and Nogales has been constrained due to production challenges stemming from rainfall experienced last month.

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 Markets are very active out of the west with less Mexican product, and slightly better markets out of the east due to increased supplies from Peru. Out of the west, Baja production remains very low due to field transitions from the north to the south and the impact of two tropical storms. Peruvian volume and sizing continue to improve. However, Peruvian arrivals continue to face delays due to mechanical issues with the shipping line, which is causing higher market prices and more air-freight products as vessels are delayed.

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. You will see extreme prorates. 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 when they can, but we have seen prorates.

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: Lighter supply in the west and strong out of South Georgia. We are in all new crop and quality is good.

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: ESCALATED Supplies are limited, and quality is okay. Hail damage and other weather-related factors have affected harvesting. The market is now escalated

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. Yields will continue to decrease as we get closer to transition.

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: ESCALATED 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 hail has really affected quality, and you will see the damage in some packs. The weather has heavily affected harvesting and quality. This is causing additional supply issues. The market is now escalated.

Spring Mix: ESCALATED Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. The hail has really affected quality, and you will see the damage in some packs. The weather has affected harvesting and quality. This is causing additional supply issues. The market is now escalated.

Snow Peas and Sugar Snaps: ESCALATED Supplies from Guatemala remain limited due to adverse weather, and quality is reported as fair at best. Peruvian production is very low as the season winds down. Domestic availability is also low following recent rainfall, keeping overall supply tight. Prices remain elevated on both coasts, with limited supplies. Relief on supplies is not expected until mid-November.

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 Tomatoes:** Supply will ramp up production out of Ruskin and Palmetto over the coming days. Volume will be light this week but should improve over the next 10 days. Quality is good.
- **Roma Tomatoes: ESCALATED** Supply is the shortest and should increase over the next ten days. Overall quality is mixed and should improve as volume increases out of Florida.
- **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 Tomatoes:** Volume is steady crossing through McAllen and Otay. Quality at all border crossings will be mixed this week and should improve over the next seven to ten days.
- **Roma Tomatoes: ESCALATED** Volume is lighter this week crossing through McAllen and Otay. 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 – Mostly done for the season due to weather.

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.