



Weekly Market Review December 23, 2025

Overview

Production continues to be steady out of Florida and Mexico due to optimal growing conditions. Steady supply and excellent quality expected through Christmas. Tomatillos are very short due to recent weather-related pressure, we are seeing a severe decrease in fresh tomatillo crossings. In addition to the volume decreases, we are also seeing spec variations mostly related to much smaller sizing being available. For the next 7 to 10 days, we expect to see shortages and pro-rates on this item as well as no peeled product being available. Grape season is taking a sharp turn as supplies dry up on storage fruit and what is left has questionable quality/shelf life. Import fruit is expected to start unloading by the first of the year. Green grapes are extremely short and will need to sub over to reds for the next 2-3 weeks. Banana supplies will get tighter going into the new year and expect to see some challenges on spot market business as growers navigate the challenges of increased demand globally combined with virus and economic pressures in the tropics. Cantaloupes quality is good with solid brix levels. Rain and colder temps have caused a smaller fruit profile and lower yields. Honeydew supplies remain tight, and sizing is heavy to the smaller 8 counts. Pineapple availability has improved some but remains limited; shippers are asking that we continue to be flexible on Pineapple sizes. The avocado harvest will be limited this week and next due to the holidays. Avocado supply remains stable with good demand driven by retail promotion and lower than average pricing. Lenticel is still present but is typical for this time of year due to rain. Chile and Colombia seasons are going strong with limited volume landing in the US. California and Baja are forecasted to receive rainfall from Tuesday through Friday. Once rainfall begins, strawberry harvests in these growing regions are expected to be postponed. To maintain coverage, growers plan to utilize Central Mexico production loading through Texas as well as production loading in Florida. In addition, Mexican product may be used to supplement California volumes for West Coast loading. These adjustments may require temporary substitutions of pack styles, labels, or specifications. California's Oxnard and Santa Maria summer planted fall crop is rapidly winding down as seasonal production concludes. The weather continues to look good in Yuma. There is rain in the forecast, but the chances keep decreasing. If this weather continues, we should continue to see industry supplies improve across the board. For now, the industry acres are still down. Some commodities are ahead of harvesting schedules, and it has created lower yields and lighter weights. This was caused by the early rain that Yuma experienced. While things are improving weekly, we still have some items that are struggling to find their footing. Brussels Sprouts, Broccoli, Broccolini, and Green Onion supplies remain extremely limited. Baby and Tender Leaf items have improved. Spinach is very tight, and growers are holding to strict averages when they can, but some prorates are to be expected. For the sprouts, Ippolito will continue to cover approximately 50% of averages across all pack sizes for at least the next two weeks. They have no jumbo sprouts available—only medium and small sizes at this time. Other Brussels sprout growers are also tight and adhering closely to averages where possible. Some prorating should be expected, though not as extreme as Ippolito's 50% reduction. With broccoli, we're seeing pin rot, water spotting and small sizing with some growers. Things are improving but with the limited yields, we have seen the market escalate once again. Yields are expected to be an issue through the end of the year. Broccolini has also tightened up. We are seeing very limited supplies across the industry. Growers are holding to very strict averages and prorates may be unavailable here soon. Green Onions are also extremely limited. The previous rain in the MX growing region has affected the industry. Yields are very low and we have seen prorates from multiple growers. Limited supplies will continue until the end of January. Plantings for the next 6 to 8 weeks have been adversely affected by the rain. Arugula and Cilantro supplies are still tight and escalated. Spinach is also now officially escalated. Growers will be holding to averages on those items. The Celery market remains high and is expected to stay that way through the end of the year. Supplies are tight and growers are holding to averages. Anise/Fennel, Leeks and Napa all remain escalated. Growers are doing as much as they can to get out the best products that they can, but we will continue to see some quality and supply issues. We will keep an eye on the weather and continue to send out updates and information as we receive it. While frost and ice are not currently a big problem, we will keep an eye on that and will keep everyone updated if any issues do arise. Please be aware that the upcoming rain and continued fog will affect citrus harvesting through the holidays. The Navel crop is beginning to tighten up on smaller sizes (138/113/88). If you can sub for larger sizes, those are more readily available. Choice grade is continuing to tighten up on all sizes as well. Lemons are readily available, peaking at 140ct. Some shippers are anticipating larger lemons becoming slightly more snug, so be aware! Grapefruit Red Rios are the main variety being packed. Crop is peaking in a 40/48 size structure. Some shippers are finishing up in California and only have product available in Texas, so stay in close contact with your suppliers on where they are loading their grapefruit. Mandarins are readily available and looking great! Please provide additional lead time on orders. Crop is peaking on 32/36. Caras have begun and are beginning to have more availability on all sizes. Bloods are beginning slowly. Anticipate pale coloring to start, and in January you will begin to see the more classic characteristics of blood oranges begin to show up. The California Garlic crop reports that supplies are steady but will continue to tighten as the year goes on. Maintain your averages to ensure product as the season continues.

Alert List

- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Boston/Butter Lettuce – **EXTREME**
- Broccoli – **ESCALATED**
- Brussels Sprouts – **EXTREME**
- Brussels Sprouts VA – **EXTREME**
- Celery/Celery Sleeved – **EXTREME**
- Cilantro – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Hot Pepper: Poblano, and Habanero – **ESCALATED**
- Kale – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce Iceberg, Cello – **ESCALATED**
- Napa – **ESCALATED**
- Green Onions – **EXTREME**
- Parsley Italia – **ESCALATED**
- Red Leaf – **ESCALATED**
- Romaine/VA Blends – **ESCALATED**
- Romaine Hearts – **ESCALATED**
- Spinach – **ESCALATED**
- Snow Peas & Sugar Snap Peas – **EXTREME**
- Strawberries – **ESCALATED**
- Table Grapes – **EXTREME**
- Tomatillo – **EXTREME**
- White Asparagus – **ESCALATED**

Watch List

1. Bananas
2. Blueberries
3. Broccolini
4. Cabbage, Red
5. Cauliflower
6. French Beans
7. Herbs
8. Lettuce
9. Limes
10. Pineapple
11. Ginger
12. Melons - Cantaloupe and Honeydew
13. Mushrooms
14. Small Oranges (138/113/88)

Weather

YUMA, AZ

Wed 12/24	Thu 12/25	Fri 12/26	Sat 12/27	Sun 12/28	Mon 12/29	Tue 12/30	Wed 12/31
76° 64°F	76° 55°F	72° 56°F	68° 55°F	68° 54°F	70° 55°F	71° 54°F	70° 53°F
							
Partly Cloudy	Sunny	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy

OXNARD, CA

Wed 12/24	Thu 12/25	Fri 12/26	Sat 12/27	Sun 12/28	Mon 12/29	Tue 12/30	Wed 12/31
61° 56°F	61° 54°F	59° 45°F	60° 47°F	63° 50°F	65° 51°F	65° 51°F	63° 50°F
							
Rain	Rain	Rain	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

COACHELLA, CA

Wed 12/24	Thu 12/25	Fri 12/26	Sat 12/27	Sun 12/28	Mon 12/29	Tue 12/30	Wed 12/31
66° 54°F	71° 50°F	68° 45°F	67° 45°F	68° 47°F	71° 49°F	72° 50°F	71° 49°F
							
Rain	Partly Cloudy	Mostly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy

HERMOSILLO, SONORA

Wed 12/24	Thu 12/25	Fri 12/26	Sat 12/27	Sun 12/28	Mon 12/29	Tue 12/30	Wed 12/31
88° 66°F	89° 62°F	89° 60°F	85° 58°F	85° 59°F	85° 59°F	84° 58°F	81° 57°F
							
Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy	Mostly Cloudy	Mostly Cloudy	PM Showers

JALISCO, NAYARIT

Wed 12/24	Thu 12/25	Fri 12/26	Sat 12/27	Sun 12/28	Mon 12/29	Tue 12/30	Wed 12/31
83° 58°F	84° 57°F	83° 55°F	79° 56°F	78° 55°F	79° 56°F	78° 57°F	78° 55°F
							
Partly Cloudy	Partly Cloudy	Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	PM Showers

VIZCAINO, BAJA

Wed 12/24	Thu 12/25	Fri 12/26	Sat 12/27	Sun 12/28	Mon 12/29	Tue 12/30	Wed 12/31
92° 60°F	94° 61°F	93° 61°F	90° 62°F	88° 62°F	89° 63°F	89° 63°F	88° 62°F
							
Partly Cloudy	Partly Cloudy	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy

IMMOKALEE, FL

Wed 12/24	Thu 12/25	Fri 12/26	Sat 12/27	Sun 12/28	Mon 12/29	Tue 12/30	Wed 12/31
82° 55°F	82° 54°F	82° 51°F	82° 53°F	81° 57°F	80° 47°F	66° 39°F	68° 44°F
							
Sunny	Mostly Sunny	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Sunny	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, tariffs will be removed over the next two weeks, based on their arrival time in the United States on items such as Bananas, Coffee and Pineapple to name a few key items. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.

Avocados: Overall volume for the US remains great, and as we finish the year, the US is on pace to surpass 3 billion pounds of consumption for the year. Sizing continues to peak towards 48s and 60s count while dry matter remains in the high 20s. Due to the rain during this time of the season, there is an increased presence of Lenticel. Lenticel are small brown spots that develop on the skin after harvest, especially during the rainy season. Lenticel has no effect on internal quality. The Main Crop now accounts for 90% of the total harvest volume. Harvest will be low during this two-week holiday period; there is still plenty of supply in the pipeline to handle demand.

Bananas: WATCHLIST Banana supply will begin to tighten up over the coming weeks as demand globally increases, and production out of the tropics is steadily declining. A combination of virus pressure and low yields, increasing cost of production have put incredible strain on our favorite staple fruit. Overall, the banana quality was very good and supplied. The key to navigating this coming year will be consistency in supply, consistency in ordering patterns and staying far ahead of any issues that could impact the integrity of the program.

Pineapples: WATCHLIST The Pineapple market has started to settle down some but remains tight. Demand remains high, keeping pricing stable. 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: EXTREME Fall production is done out of California, and storage inventories are rapidly declining as we still see strong demand post-Christmas. Existing California fruit will see more prevalent quality issues such as high shatter, waterberry, possibly mold and nesting as well as depleted shelf life as the fruit continues to age. Green grapes are done and will need to sub to reds until consistent supply starts coming in from Chile and Peru. We do not expect significant volume and will see market volatility through the first of the year at the earliest; possibly the second week of January. We recommend scaling back portions until those markets ease back or consider making substitutions to alternate options such as cut fruit over the next week to 10 days.

Berries

Strawberries: ESCALATED California and Baja are forecasted to receive rainfall from Tuesday through Friday. Once rainfall begins, strawberry harvests in these growing regions are expected to be postponed. To maintain coverage, growers plan to utilize Central Mexico production loading through Texas as well as production loading in Florida. In addition, Mexican product may be used to supplement California volumes for West Coast loading. These adjustments may require temporary substitutions of pack styles, labels, or specifications. California's Oxnard and Santa Maria summer planted fall crop is rapidly winding down as seasonal production concludes. However, fall-planted spring crops in both regions are coming online at the right time to support steady supplies through the winter months. Quality remains good, with volumes expected to increase in early 2026. Baja Mexico is entering the early stages of seasonal production, with volumes expected to build steadily and become more impactful after the start of the new year. Quality is good, and organic production is also ramping up. Overall volumes are forecasted to increase in early 2026. Central Mexico continues to increase production on a weekly basis. Overall quality remains good, with solid availability across current packs. Production is underway in Florida, with volumes increasing steadily. Quality is good, featuring full color, ripe, red fruit.

Blackberries: Production remains active in Central Mexico and Baja, with good availability across current packs. Overall quality is good; however, some instances of softness and red cell or color reversion are being observed due to recent heat, rainfall, and elevated humidity in the growing regions.

Raspberries: Production remains active in Central Mexico and Baja, though supplies have tightened as crops move past their seasonal peak, resulting in reduced availability. Overall quality remains good; however, some instances of soft or overripe product are being observed due to recent heat, rainfall, and elevated humidity in the growing regions.

Blueberries: WATCHLIST Production continues in Central Mexico with good availability. Mexican quality and sizing remain very good across current packs.

Citrus

Limes: WATCHLIST Supply is starting to shift heavy to larger fruit and quality will decline a tad as growers continue to harvest in older groves. Smaller sized fruit naturally is tighter and seeing continued upward pressure on the FOB prices. Long term we do expect some size and price vulnerability going into the next two weeks as well as possible harvest delays due to rain in the region and Holiday delays.

Specialties: Blood oranges and Cara Cara's are anticipated to begin in mid-December. When bloods begin in December, please be aware that the typical "blush" exterior may not be present, though internally you will find it! By mid-January, you will begin to see more of the typical exterior "blush" color on bloods.

West Coast Lettuce

Iceberg: ESCALATED Lettuce quality and supplies are okay. Weights remain light. The market is still very active. The weather has affected both harvesting and quality. The market is not escalated now but growers expect the market to rise again after the holidays. Growers are watching for soilborne diseases, and we get into the crops that were planted during the heavy rains. Cello Lettuce is still slightly escalated for next week.

Iceberg VA: ESCALATED Quality and supplies are good.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, mechanical damage, lightweights, fringe burns and light cupping. For the hearts, we are seeing very little heart material. The weather has affected harvesting and quality.

Romaine VA: EXTREME Quality is okay, and supplies are good. The weather has affected harvesting and quality.

Boston/Butter Lettuce: EXTREME Quality is okay, but supplies are tight. We have seen mildew and fringe burn pressure. The weather has affected harvesting and quality.

Green Leaf, Better Burger and Red Leaf: ESCALATED Quality is good and supplies have improved. We have seen mildew and fringe burn pressure. We are still seeing lighter carton weights, but things are getting better. The weather has affected harvesting and quality.

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, tariffs will be removed over the next two weeks, based on their arrival times in the United States on items such as Bananas, Coffee and Pineapple to name a few key items. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements can be reached.*

Green Bell Pepper: Steady supply available from Coachella, Nogales, McAllen and South Florida. Quality is good. We do expect to wrap up out of Coachella next week and move completely to Nogales out west.

Color Bell Pepper: WATCHLIST Still picking a few peppers out of the desert but mostly done for the season and transitioning to Nogales. Starting to see more volume crossing through Nogales on open field as well as hothouse blocky pepper. Markets expected to be firm through New Years. Quality is good on all colors.

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

Mixed Chili Pepper: ESCALATED Supplies will begin to increase through the month of December, which will improve quality as well as availability. We expect to see downward pressure on pricing as well. Growing conditions are optimal for Sinaloa and Sonora. We will see escalated markets on Habanero, Poblano and Tomatillo through Christmas.

Tomatillo: EXTREME Due to recent weather-related pressure, we are seeing a severe decrease in fresh tomatillo crossings. In addition to the volume decreases, we are also seeing spec variations mostly related to much smaller sizing being available. For the next 7 to 10 days, we expect to see shortages and prorates on this item as well as no peeled product being available.

Eggplant: Domestic supply is steady out of Florida while crossing through Nogales continues to be strong. Quality coming from both regions is very nice.

Slicer Cucumbers: Supply crossing through Nogales and McAllen is steady this week and quality outstanding. Domestic supply will quickly transition to South Florida as Georgia lost most of its crop due to weather. Quality is good out of all growing regions this week.

English Cucumbers: Steady supply available this week crossing through Nogales and Canada. Quality is good.

Pickles: Supply ramping up out of Florida and Mexico. Quality is good.

Green Beans: Holiday demand has increased, and we are seeing upward pressure on prices this week. Supply is steady out of Florida as they break new fields, and crossings continue to be steady through McAllen and Nogales. Overall, quality is good. We expect to see stable markets going into Christmas and New Year's pull over the next week.

French Beans: WATCHLIST Guatemalan production and quality remain good, with supplies considered fair. Mexican French bean availability is also fair, with steady production supporting current demand.

Zucchini/Yellow Squash: Supply stable and quality is good out of Florida as well as crossing through McAllen and Nogales.

Herbs: WATCHLIST Basil production remains strong from Colombia and Mexico, though some quality issues have been reported due to heat in the fields. Imported chervil supplies continue to be limited as weather in Ecuador impacts production. Overall, herb availability is steady with good quality, except for sage, which remains tight due to weather-related challenges. Quality across some items may continue to vary depending on field conditions.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Limited	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	Limited	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	Limited	Limited	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 WATCHLIST

Overview: We will see steady cantaloupe arrivals through next week but production in Guatemala will see a significant decrease over the next two to three weeks. With the next growing areas not set to begin until the first week of January, we are expecting to realize a decrease close to 50% of current levels. With back-to-back holiday weeks approaching this shortfall likely will not be realized until the week of Jan 5th.

Cantaloupe: We are starting to see the sizing profile almost exclusively to the 9/12s, with less than 10% of jumbo fruit being harvested. Overall, the fruit is strong, with solid netting, good internal quality and brix levels ranging from 12-14%. Shippers are anticipating overall production to improve over the next month or so.

Honeydew: Northern Mexican production has finished which put more pressure on the offshore fruit. Honeydews are expected to be tight for the next three to four weeks. Flexibility on sizing will be required during this period. Overall volume remains extremely limited. Scarring is a common characteristic at this time of the year, and mud/dirt will also be seen.

Watermelon: Domestic watermelons are limited to Florida and winding down for the season; they will be back in production early April. First offshore arrivals are scheduled for this Friday. The supply of Mexican watermelons via Texas and Nogales has steady and quality if good. Markets are escalated and expected through New Year's.

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 Mexican production has slowed due to recent weather challenges, regional transitions, and ongoing logistical constraints. Peruvian volumes continue to build in the northern Trujillo region, while production in the southern Ica region is tapering off as the season winds down. This seasonal shift in Ica is resulting in a greater proportion of small and standard sizes. With reduced availability from Mexico and increased holiday demand, markets have become more active and remain firm.

Bok Choy: Quality and supplies are good.

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is okay, but supplies are extremely limited with some growers. The market has once again escalated. We have still had reports of Browning, Pin Rot and Larvae from the insects. Some growers are still prorating. Organic Broccoli is still at the Extreme Trigger. The weather has affected harvesting and quality. Yields will continue to be challenging as we go into the holiday season.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality is good, and supplies are still limited with most growers. The weather has affected harvesting and quality. Growers are holding to strict averages when they can, but you could see prorates as we finish out the year.

Brussels Sprouts: EXTREME Supplies are extremely limited. Growers are struggling with yields. Insect pressure and internal browning continue to be reported, and quality just looks okay. The market is still at the extreme trigger. Severe prorates should be expected. Growers are covering 50% of weekly averages. Mid-December is when we will see MX sprouts come into play so you should expect quality and supply issues until we reach Jan 2026.

Carrots (JUMBOS, MEDIUMS and CELLOS): Due to the continued rain events supplies are tight on Bay Carrots, Cellos and Jumbos. Availability will be limited. Rainbow Carrots remain steady and have great quality and supplies. 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. Rainfall has affected harvesting for some growers. Cello and Jumbo Carrots are the most heavily affected in all regions, and there will be limited availability until weather conditions improve.

Cauliflower: WATCHLIST Quality and supplies are good.

Celery: EXTREME Quality is good, but supplies are extremely tight. The market prices continue to trend upward. Demand has risen due to the holidays and football season. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging throughout the year.

Corn, Sweet: Lighter supply overall out of Florida and Mexico. Markets were firmer this week 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. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Leeks: ESCALATED Quality and supplies look okay.

Garlic: Quality remains good although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and market are steady.

Green Cabbage: Supplies are still tight, but they are improving. Quality is good. Some growers are still holding to averages. The weather is still affecting harvesting and quality. This could cause supply issues. Yields will continue to be challenging as we go into the holiday season.

Green Onions: EXTREME Supplies are very inconsistent. Quality looks okay. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season. The previous rain in the growing region in MX continues to hamper supplies. Growers are holding to very strict averages when they can but prorates should be

expected for at least the next 3 weeks. Plantings for the next 6 to 8 weeks were affected by the previous rains, and yields are likely to be an issue until the end of January.

Mushrooms: WATCHLIST We are into our typical holiday pattern now with lower volume and extremely high demand for the Holidays. Supply expected to be light through the first of the year. Quality is good.

Napa Cabbage: Quality is good, but supplies are tight. The market is increasing.

Parsley (Italian & Curly): Supplies and quality have both been affected by the recent rains. As with the baby leaf items, parsley was unable to be harvested, and growers will need to catch up on supplies. Prorates should be expected. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

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 still limited. We have still seen some reports of weak texture, discoloration and wilting. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Spring Mix: Supplies on Spring Mix are limited this week. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Snow Peas and Sugar Snaps: EXTREME Supply of Guatemalan snow peas and sugar snaps continues to build steadily. Peruvian production is at or near the end of the season, with volumes declining due to normal seasonal transitions. Mexican snow pea supplies remain limited as growers move through field transitions, while Mexican sugar snap availability continues to show gradual improvement.

Onions:

The onion market remains stable. With harvest concluded, all products 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 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

- **Round Tomatoes:** Supply is plentiful on new crop rounds out of Ruskin and Palmetto, and seeing deals made across all sizes with lackluster demand going into the Thanksgiving Pull. Quality is outstanding.
- **Roma Tomatoes:** Supply is slowly improving this week as growers break new fields. However, still expect some volatility this week. Overall quality is good out of Florida.
- **Snacking Tomatoes:**
 - **Grape Medley:** Supply will remain tight over the next week; we hope to see more volume come on as the growing conditions continue to stay favorable.
 - **Grape Tomatoes:** Supply is steady and quality is good.
 - **Cherry Tomatoes:** Supply is steady and quality is good.

Mexico

- **Round Tomatoes:** Volume is steady crossing through McAllen and Otay. Quality is good.
- **Roma Tomatoes:** Excellent supply this week as growers break new fields, however, still expect some volatility this week should the National Market improve. Overall quality is good
- **Snacking Tomatoes:**
 - **Grape Medley:** Supply is lighter this week and quality is outstanding.
 - **Grape Tomatoes:** Supply is steady and quality is good.
 - **Cherry Tomatoes:** Supply is steady and quality is good.

Other Fruit:

Apples: The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

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: Steady supply 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.