



## Weekly Market Review January 8, 2026

### Overview

Production continues to be steady out of Florida and Mexico due to optimal growing conditions. Quality overall is good on all commodities. We are assessing last week's cold weather in Florida to see what damage or slowdowns will be experienced since that event. Tomatillos remain short due to recent weather-related pressure; however, it does seem to be slowly improving as the season progresses. We will see the market continue to retreat over the coming days. Table Grapes are seeing some finally seeing relief as offshore volume continues to increase and fill the supply chain across the country. Good supply on reds, while green varieties are behind and are the shortest. Quality has been outstanding! Lime market is active and large sized fruit is tighter this week as we drill into the newer regions, which are peeking on 200's and smaller currently. We expect volatility through Q1 as predicted. Banana supplies are expected to tighten going into the new year, with challenges anticipated on spot market business as growers navigate increased global demand combined with virus and economic pressures in tropical growing regions. We are seeing lighter arrivals on Cantaloupes and Honeydews from Guatemala due to rain and cold nights that caused lower yields. While quality has been holding up, both cantaloupe and honeydew volumes are expected to be down for the next month. Pineapple availability has improved slightly but remains limited, and shippers are asking that we continue to be flexible on pineapple sizes. Avocado availability is limited this week following two consecutive weeks of lighter harvests in Mexico over the holiday period. Heavy demand combined with reduced availability at the border is contributing to higher market pricing across all sizes in the short-term. Demand is anticipated to remain strong throughout the month, and harvests are expected to ramp up in the coming weeks to meet industry volume needs. The current size profile continues to favor medium and large fruit, while small sizes are becoming more limited as the season progresses. 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 currently landing in the U.S. California and Baja strawberry production continues to be impacted by recurring rain and persistently wet conditions. Intermittent rain events over the past ten days have disrupted harvest activity, and this pattern is expected to continue into next week and potentially beyond. Crews have been able to harvest select fields as they work through rain related cleanup of damaged plants and fruit in Oxnard, Irvine, and Baja. To supplement supply during this disruption in California production, Mexican product is being transferred into California for West Coast loading. Please note that this fruit will have additional days in transit, and quality and shelf-life expectations should be adjusted accordingly. To preserve condition, this product should not be routed through cross-docks or longer cross-country lanes. Due to these production challenges, temporary substitutions in labels and pack sizes may be necessary to fulfill committed orders. Elsewhere, supplies are increasing and the quality is good. Over the holiday, some regions experienced heavy rainfall, and industry acreage has significantly decreased on a few items. The recent rains have affected overall supplies on Carrots, Celery and Green Onions. Those 3 items are likely to see prorates. Green Onions will continue to be very limited and as mentioned in the Market Alert, will likely not see relief until the end of January. Celery fields were significantly affected by the storms and as a result, Whole Celery will be held to strict averages, but you will see prorates on the VA Celery packs. The prorates will not be severe but 10-15% allocations should be expected on the VA items. Celery supply will remain limited until mid-February. Carrots are also being held to strict averages, but you should expect to see the prorates on Cello's and Jumbos. Harvesting has been greatly affected by the rain and with the fog settling in, they are not getting the sun they need to dry up the fields. With more rain in the forecast, these issues are expected to last for the next 2-3 weeks. While those items remain extremely tight, we have finally started to see relief on Brussel Sprouts. The supplies from MX have improved over the past week and it looks like conditions and supplies will continue to improve week over week. We should start to see Brussel Sprouts regain stability starting next week. Italian parsley, cilantro and spinach remain very tight, with growers holding to strict averages where possible, though some prorates are expected. The spinach market remains escalated, and we are seeing increased insect pressure. Supplies are limited. Broccoli remains escalated, but the market is trending down. Some growers continue to experience pin rot, water spotting, and smaller sizing which is resulting in limited supplies. We are watching this item closely. Artichokes, Anise/Fennel, Leeks, and Napa Cabbage also remain escalated, with ongoing quality and supply challenges. Artichokes only have small sizes (12ct) available. Celery, Green Onions, Parsley, and Brussels Sprouts remain the most challenging commodities at this time. We are keeping a close eye on Lettuce and Romaine. Mildew has been reported, and we are keeping an eye on soil borne diseases. We will continue to send out updates as we receive information. Lemons are available from both houses across all sizes, with fruit skewing toward a fancy grade and peaking on 140s and larger, followed by 165s and 200s. Harvest in District 3 will conclude at the end of January, aligning well with peak harvest in District 1, where heavy fancy-grade fruit is running primarily 115s, 140s, and 95s, followed by 165s. Heavy December rains are expected to support additional growth in Districts 1 and 2 further south, and a premium on 165s and 200s lemons is anticipated this spring. For Navels, sizing is trending larger than prior estimates following the most recent rain event and continues to be evaluated; some suppliers' latest field projections indicate 56s and larger at approximately 240% above normal, while 113s and smaller are at just 30% of normal. As a result, small navels will remain tight for the balance of the season, and customers are encouraged to stay in close contact with suppliers regarding potential substitutions, such as Mineolas or Mandarins (both will be opening back up in the next couple weeks). Mandarins have been the most impacted by recent rain and fog for some suppliers, delaying harvest until fields dry, while others are reporting some coloring issues; overall quality and supply are expected to improve within the next couple of weeks. Cara Cara oranges are currently peaking on 88 FCYs, California Grapefruit has mostly concluded for the season, with current availability coming out of Texas and peaking on 40s, 48s, and larger sizes. The California Garlic crop is reporting steady supplies, though availability is expected to tighten as the year progresses. Maintaining averages is recommended to ensure continued coverage as the season advances.

### Alert List

- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Bok Choy – **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: Red Fresno, Poblano and Habanero – **ESCALATED**

- Leeks – **ESCALATED**
- Limes – **ESCALATED**
- Napa – **ESCALATED**
- Green Onions – **EXTREME**
- Parsley Italian – **ESCALATED**
- Red Leaf – **ESCALATED**









- Spinach – **ESCALATED**
- Snow Peas & Sugar Snap Peas – **ESCALATED**
- Strawberries – **ESCALATED**
- Table Grapes – **ESCALATED**
- Tomatillo – **ESCALATED**
- White Asparagus – **ESCALATED**

#### Watch List









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

#### Weather









##### YUMA, AZ

Thu 1/8	Fri 1/9	Sat 1/10	Sun 1/11	Mon 1/12	Tue 1/13	Wed 1/14	Thu 1/15
68°   49°F	63°   45°F	67°   48°F	73°   52°F	75°   50°F	78°   53°F	81°   54°F	81°   55°F
							
Mostly Sunny	Sunny/Wind	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









##### OXNARD, CA

Thu 1/8	Fri 1/9	Sat 1/10	Sun 1/11	Mon 1/12	Tue 1/13	Wed 1/14	Thu 1/15
63°   44°F	65°   48°F	72°   48°F	71°   50°F	73°   55°F	74°   57°F	78°   58°F	74°   56°F
							
Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny









##### CULIACAN, SINALOA

Thu 1/8	Fri 1/9	Sat 1/10	Sun 1/11	Mon 1/12	Tue 1/13	Wed 1/14	Thu 1/15
83°   52°F	85°   50°F	86°   54°F	87°   58°F	81°   56°F	86°   55°F	88°   55°F	89°   57°F
							
AM Clouds/PM	Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy









##### HERMOSILLO, SONORA

Thu 1/8	Fri 1/9	Sat 1/10	Sun 1/11	Mon 1/12	Tue 1/13	Wed 1/14	Thu 1/15
70°   49°F	70°   47°F	75°   52°F	79°   53°F	81°   50°F	82°   50°F	84°   52°F	86°   52°F
							
Partly Cloudy	Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









##### JALISCO, NAYARIT

Thu 1/8	Fri 1/9	Sat 1/10	Sun 1/11	Mon 1/12	Tue 1/13	Wed 1/14	Thu 1/15
76°   51°F	75°   51°F	77°   55°F	77°   56°F	76°   55°F	75°   55°F	77°   54°F	77°   55°F
							
Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy

## VIZCAINO, BAJA

Thu 1/8	Fri 1/9	Sat 1/10	Sun 1/11	Mon 1/12	Tue 1/13	Wed 1/14	Thu 1/15
85°   57°F	86°   55°F	86°   58°F	86°   59°F	81°   57°F	86°   55°F	88°   57°F	89°   58°F
							
Cloudy	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

## IMMOKALEE, FL

Thu 1/8	Fri 1/9	Sat 1/10	Sun 1/11	Mon 1/12	Tue 1/13	Wed 1/14	Thu 1/15
85°   62°F	86°   61°F	86°   61°F	85°   56°F	78°   58°F	81°   58°F	78°   60°F	73°   45°F
							
Mostly Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Thunderstorms	AM Showers

## 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:** Mexico had a 53.7-million-pound for week 1, with 46.6 million pounds shipped to the U.S. Sizing continues to peak toward 48s and 60s count, while dry matter has climbed to 30%. The main crop now accounts for 90% of the total harvest volume. Demand is expected to remain strong in January, with harvest volumes anticipated to increase starting next week to better align with industry needs.

**Bananas: WATCHLIST** Banana supply will begin to tighten over the coming weeks as global demand increases and production in the tropics steadily declines. A combination of virus pressure, low yields, and increasing production costs has placed significant strain on this staple commodity. Overall, banana quality remains very good, and supply is adequate. The key to navigating the coming year will be consistency in supply, consistent ordering patterns, and staying proactive to address any potential issues that could impact the program.

**Pineapples: WATCHLIST** The pineapple market has begun to settle slightly but remains tight. Demand continues to be high, keeping pricing stable. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, quality and taste are good.

**Table Grapes: ESCALATED** We are done with storage fruit and all into now crop from South America. Quality is outstanding. Markets are still firm, however, they are sliding as more fruit becomes available. Green fruit does seem to be the tightest but expected to improve over the next 10 days. Green varieties available: Sweet Globes. Red varieties: Red Globes, and Sweet Flavor. There are also generic varieties on all three colors available this week.

## Berries

**Strawberries: ESCALATED** Supplies out of the west are tight due to ongoing rainfall in the growing regions. The Oxnard and Santa Maria summer-planted fall crops are rapidly declining as seasonal production winds down. Fall-planted Spring crops in both regions are coming into production at the right time to support steady supplies through the winter months. Overall quality remains good, with volumes expected to increase in early 2026 once wet weather conditions subside. Baja is entering the early stages of seasonal production, with volumes expected to build steadily and become more impactful after the first of the year. Quality remains good, and organic production is also ramping up. Volumes are forecasted to increase in early 2026 as wet weather conditions improve. 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. Overall 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 remains 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 continues 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 fruit are being observed due to recent heat, rainfall, and elevated humidity in the growing regions.

**Blueberries: WATCHLIST** Production continues in Central Mexico, though supplies are tightening as crops move past seasonal peak volumes. Mexican quality and sizing have remained very strong. Central Mexico blueberry quality is being reported as significantly higher than offshore blueberry offerings currently in the market.

## **Citrus**

**Limes: ESCALATED** Supply will be short this week out of Mexico, Columbia and Peru. Size profile and very low volume due to rainfall seem to be the common impacts to the growing regions. As we get deeper into the new crop, we expect to see very light volume on 175's and larger. All regions are Peeking on 200's and smaller. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability is expected through March.

**Small Oranges: WATCHLIST** Small fruit is very tight and is expected to continue tightening as harvesting is affected by rain and fog.

## **West Coast Lettuce**

**Iceberg:** Lettuce quality and supplies are okay, with weights remaining light. The market is active, and weather has affected both harvesting and quality. While the market is not currently escalated, growers expect it to rise again due to yields being low because of mildew damage and cap leaves. Growers are monitoring for soilborne diseases, particularly in crops planted during heavy rains.

**Iceberg VA:** Quality and supplies are just okay. We have seen reports of short shelf life and mildew in bags.

**Romaine & Romaine Hearts:** Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, mechanical damage, light weights and mildew on the outter leaves. For the hearts, very little heart material is available. Weather has impacted both harvesting and quality.

**Romaine VA:** Quality and supplies are okay. We have seen more core in teh bags and some mildew. Weather has affected harvesting and overall quality.

**Boston/Butter Lettuce: EXTREME** Quality is okay, but supplies are tight. Mildew and fringe burn pressure have been observed, and weather continues to affect harvesting and quality.

**Green Leaf, Better Burger and Red Leaf:** Quality is good, and supplies have improved. Mildew and fringe burn pressure persist, and carton weights remain light, though conditions are improving. Weather has impacted both harvesting and quality.

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## **Florida Weather Update**

*Growers are assessing the potential for loss and production impacts from last week's cold weather that hit Florida. Some items have been immediately impacted such as Corn, Squash and Tomatoes with the slow down or crop loss however we do feel like there will be a decent and quick rebound for the immediate future; it's the long term where we may see some issues arise where crops could be impacted by bloom drop, which we cannot truly evaluate immediately. We are keeping a close eye on this and speaking with our growers daily.*

**Green Bell Pepper:** Steady supply and good quality available from Nogales, McAllen, and South Florida.

**Color Bell Pepper:** Steady volume and good quality available out of McAllen and Nogales.

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

**Mixed Chili Pepper: ESCALATED** Supplies are good out of Sinaloa and Snora currently. Markets will remain escalated for Habanero, Poblano, Red Fresno, and Tomatillo. We hope to see improvement next week on the short items.

**Tomatillo: EXTREME** Due to recent weather-related pressure, we are seeing a severe decrease in fresh tomatillo crossings. In addition to reduced volumes, specification variations are mostly related to smaller sizing being available. Over the next 7–10 days, shortages and prorates are expected, and no peeled product will be available.

**Eggplant:** Domestic supply is steady out of Florida, while crossings through Nogales remain strong. Quality from both regions is very good.

**Slicer Cucumbers:** Supply crossing through Nogales and McAllen is steady this week, and quality is outstanding. Domestic supply will slow down this week with the cooler weather; Honduras will start shipping over the next week or so. Quality is good across all growing regions this week.

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

**Pickles:** Supply lighter out of Florida due to cooler weather. Steady crossings through Nogales and McAllen. Quality is good.

**Green Beans:** Supply was lighter this week out of Florida due to the cooler weather that hit the region last week; this should improve over the next two weeks. Mexico is continuing to improve. The long-term forecast, barring any issues in Florida, remains steady throughout January. Overall quality is good.

**French Beans: WATCHLIST** Supplies of both organic and conventional French beans out of Guatemala are fair to good, though container delays continue to impact movement. Mexican French bean availability is fair, with cooler weather affecting yields.

**Zucchini/Yellow Squash:** Supply is lighter out of Florida and crossing through Nogales due to the cold weather that went through last week and markets have reacted. McAllen and Nogales seem to be stable. Quality is good out of Mexico.

**Herbs: WATCHLIST** Basil production from Colombia and Mexico is good, though some quality issues have been observed due to recent rainfall. Chives production remains low as a result of weather impacts and arrival delays tied to the holidays. Italian Parsley is extremely limited from some growers and prorates should be expected.

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 are now seeing a drop in arrivals for both Cantaloupe and Honeydew due to weather-related issues during the growing cycle. The next growing areas may not be ready until the first or second week of January.

**Cantaloupe:** Production should increase next week. Sizing will be primarily 9s, followed by jumbo 9s. Smaller fruit will be fairly limited over the next few weeks. Quality has been good overall, with a slightly greener cast, but the fruit has been cutting very well. Brix levels mostly range from 12–14%.

**Honeydew:** Honeydew production is extremely limited, as these plants were impacted more by the wet and cooler weather experienced during the growing cycle. We expect honeydews to be a challenge for at least the next two weeks, with improvements likely around the week of January 12 arrivals. Flexibility on sizing will be required during this period. Scarring is a common characteristic at this time of year, and mud/dirt will also be seen.

**Watermelon:** Domestic Watermelons are limited to Florida and are winding down for the season; production will resume in early April. Offshore watermelons from Guatemala have arrived, providing a steady supply of both cartons and bins. Supply of Mexican watermelons via Texas and Nogales is steady, and quality is good.

### **Mixed Vegetables**

**Artichokes: ESCALATED** Quality is good, but supplies are extremely limited. Growers are holding to strict averages, and there may be some substitutions on sizes. Large sizes are extremely tight, with growers mainly subbing 12ct and 18ct when possible. These sizing issues are expected to last at least through the end of January. Artichokes 24ct are at the extreme trigger.

**Asparagus: ESCALATED** Mexican production remains limited due to ongoing weather challenges, regional transitions, and logistical constraints. Peruvian volumes continue to increase in the northern Trujillo region, while production in the southern Ica region is slowing as the season winds down, shifting the size profile toward more small and standard fruit. With reduced availability from Mexico following last week's holiday pull, markets remain active and firm.

**Bok Choy: ESCALATED** Quality and supplies are okay

**Broccoli Florets/Broccoli Crowns: ESCALATED** Quality is okay, but supplies remain limited with some growers. The market remains escalated. Reports of browning, pin rot, and insect larvae continue. Organic Broccoli remains at the extreme trigger. Weather has affected harvesting and quality, and yields will continue to be challenging until at least the end of January.

**Broccolini and Sweet Baby Broccoli: WATCHLIST** Quality is good, but supplies are still limited with most growers. Weather has affected harvesting and quality. Growers are holding to strict averages, when possible, but prorates may occur.

**Brussels Sprouts: EXTREME** Supplies are still limited but are improving. We have still seen some insect pressure and internal browning, but overall quality is getting better. The market remains at the extreme trigger, but we should start to see some relief in the next few weeks.

**Carrots (JUMBOS, MEDIUMS and CELLOS):** Due to continued rain events, supplies are tight on Baby Carrots, Cellos, and Jumbos, with limited availability. Rainbow Carrots remain steady with good quality and supply. Harvesting has been challenging because of muddy fields. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Rainfall has affected harvesting for all of the growers. Cellos and Jumbos are the most heavily impacted. Prorates should be expected. Availability will remain limited until conditions improve (Approx. 2-3weeks). Grower's request orders be sent in as early as possible.

**Cauliflower: WATCHLIST** Quality and supplies are good. Organic Cauliflower is at the extreme level.

**Celery: EXTREME** Quality is okay, and supplies are extremely tight. Weather has affected harvesting and quality, and recent storms are expected to cause prorates on VA items. Quality issues should be expected as they growers work through the affected fields.

**Corn, Sweet:** Overall supply is lighter from Florida and Mexico this week which was keeping upward pressure on price. Quality is good.

**Fennel: ESCALATED** Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

**Kale:** Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

**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 and quality are good.

**Green Onions: EXTREME** Supplies are extremely limited, and quality is okay. Some growers have reported being completely out of supplies. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging through January. Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to very strict averages, when possible, but prorates should be expected for at least the next two weeks. Plantings for the next 3–4 weeks were affected by prior rains, and yields are likely to remain an issue until the end of January. A Market Alert was sent out.

**Mushrooms:** We are now into our typical holiday pattern, with lower volume and extremely high demand. Supply is 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): ESCALATED:** Supplies and quality have been affected by recent rains. Prorates should be expected on Italian Parsley. Weather has affected harvesting and quality. Yields are expected to remain challenging throughout January.

**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 remain limited. Reports of weak texture, discoloration, and wilting continue. Weather has affected harvesting and quality, causing additional supply issues. Yields are expected to remain challenging throughout January.

**Spring Mix:** Supplies are limited this week. Weather has affected harvesting and quality, causing additional supply issues. Yields are expected to remain challenging throughout January.

**Snow Peas and Sugar Snaps: ESCALATED** Supply of Guatemalan snow peas and sugar snaps continues to improve, with stronger gains in sugar snaps than snow peas. Mexican snow pea availability remains limited due to ongoing field transitions, while Mexican sugar snap supplies are plentiful.

#### Onions:

The onion market remains stable. With harvest concluded, all products will ship exclusively from storage in the Pacific Northwest. While modest increases may 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, while Norkotahs will continue to make up the majority of 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 was lighter this week due to the cold front that went through the state last week. Quality remains good and we should see improvement on supply over the next two weeks.
- **Roma Tomatoes:** Supply will be lighter this week and struggling on color and expect some volatility this week. Overall quality is good out of Florida.
- **Snacking Tomatoes:**
  - **Grape Medley:** Supply was lighter this week and pricing was higher. Quality remains very nice.
  - **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 Tomatoes:** Excellent supply and great quality available.
  - **Grape Medley:** Supply is tightened up this week, and pricing was much higher. 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.