

Overview

Tomato production continues to fluctuate in South Carolina, Tennessee, and Virginia due to heavy rain. Markets went higher this week. Mexico's production of Rounds and Romas remains steady. We are finally starting to see some relief in the Snacking Tomato market, but we still expect some challenges over the next week. In California, Tomato production remains steady. The Lime market will begin to see an uptick on price and volume declines; new crop will be significantly different, leaning heavily to smaller fruit; 175's and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks. Hot Pepper production is expected to stabilize most varieties; however, Shishito, Habanero, and Red Fresno Peppers continue to be in the shortest supply. Zucchini/Yellow Squash were both tight this week as well as slicer cucumber. U.S. Table Grape supplies are steady this week, and quality is outstanding on the new crop out of California. We will also start to see the impacts of the Canadian Tariffs on Mushrooms impact the industry over the coming weeks. In addition to these increases, we will also see increases across the domestic supply chain, which mostly impacts growing and operating costs.

Warm weather along with disease and insect pressure will continue to affect harvestable acreage. Growers anticipate these challenges will remain a significant factor impacting supplies throughout the season, with Leafy Greens, Broccoli and Cauliflower being the items most likely affected. Artichokes and Anise/Fennel remain in limited supply due to ongoing supply constraints. For Broccoli and Lettuce, supplies continue to tighten. While those markets are not currently escalated, we will keep those items on the watchlist as supplies are limited.

With the U.S. resuming full operations in Michoacan, the Avocado market has been able to replenish supplies fairly quickly. The size curve out of Mexico has shifted and now favors 48ct, 60ct and smaller. Markets have become tighter and we have seen an increase in price. California and Peru production is slowly starting to taper off but we can expect volume from both into September. Cantaloupe and Honeydew demand is starting to pick up as retailers are promoting both melons for the Labor Day holiday weekend. Production and quality remain strong.

Berry markets remain mixed, with Strawberries representing the most significant supply concern as California moves through a challenging seasonal production transition. Strawberry availability could decline by as much as 50% over the next 2-3 weeks as Watsonville and Salinas production falls faster than Santa Maria can replace it, while stronger seasonal demand continues to pressure an already limited market. Blackberry supplies are improving from Watsonville, while Raspberry availability remains favorable as California production continues through its seasonal peak, although Mexican production for both commodities remains limited. Blueberry supplies remain steady from the Pacific Northwest but are expected to decline heading into September, with early Peruvian imports beginning to supplement domestic availability. Broader Berry supplies should begin improving in September as Santa Maria and Baja Strawberry production increases, Mexican Blackberry and Raspberry volume rebounds, and Peruvian Blueberry imports gradually build.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including Lemons and Oranges, with fruit generally trending larger. California Valencias are in full swing. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. Grapefruit supplies are currently stable. Please consider imported Citrus as it will help relieve strained sizing, particularly for East Coast demand.

Freight: Limited truck availability and record-high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including ocean freight providers, implement fuel surcharges that will impact cost inputs.

Alert List

- Asparagus – **EXTREME**
- Artichokes – **EXTREME**
- Celery, Organic – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Limes (175's and larger) – **ESCALATED**
- Strawberries – **EXTREME**
- Squash- Zucchini and Yellow – **ESCALATED**
- Tomatoes, Rounds and snacking varieties – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List

1. Blackberries
2. Broccoli
3. Broccolini
4. Cabbage, Green
5. Cauliflower
6. French Beans
7. Green Onions
8. Herbs
9. Lettuce
10. Romaine
11. Ginger
12. Small Citrus Sizes across all Varieties
13. Spinach
14. Potatoes
15. Sweet Potatoes

Weather
SALINAS, CA

Thu 8/20	Fri 8/21	Sat 8/22	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27
68° 58°F	69° 57°F	71° 56°F	70° 56°F	69° 56°F	71° 57°F	74° 58°F	71° 59°F
							
Mostly Cloudy	AM Clouds/PM	Partly Cloudy	Mostly Cloudy	AM Clouds/PM	AM Clouds/PM	Partly Cloudy	Mostly Sunny

BAKERSFIELD, CA

Thu 8/20	Fri 8/21	Sat 8/22	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27
106° 77°F	102° 75°F	101° 74°F	103° 75°F	104° 74°F	103° 73°F	101° 75°F	95° 72°F
							
Mostly Sunny	Partly Cloudy	Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Mostly Sunny

OXNARD, CA

Thu 8/20	Fri 8/21	Sat 8/22	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27
78° 67°F	79° 67°F	80° 67°F	79° 67°F	79° 67°F	81° 68°F	80° 68°F	80° 69°F
							
AM Clouds/PM	Mostly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy

JALISCO, NAYARIT

Thu 8/20	Fri 8/21	Sat 8/22	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27
87° 68°F	85° 66°F	84° 66°F	84° 66°F	85° 66°F	84° 66°F	85° 67°F	86° 68°F
							
Isolated Thunderstorms	PM Thunderstorms	PM Thunderstorms	Scattered Thunderstorms	PM Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms

VIZCAINO, BAJA SUR

Thu 8/20	Fri 8/21	Sat 8/22	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27
104° 76°F	107° 75°F	109° 78°F	103° 79°F	103° 78°F	104° 78°F	104° 79°F	105° 79°F
							
Partly Cloudy	Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Mostly Sunny	Mostly Sunny

TORREON, COAHUILA

Thu 8/20	Fri 8/21	Sat 8/22	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27
99° 70°F	97° 68°F	98° 68°F	97° 69°F	97° 70°F	98° 70°F	99° 70°F	99° 71°F
							
Sunny	Mostly Sunny	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny

EVENSVILLE, TN

Thu 8/20	Fri 8/21	Sat 8/22	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27
91° 68°F	87° 67°F	89° 66°F	87° 62°F	86° 62°F	87° 69°F	86° 68°F	88° 66°F
							
PM Thunderstorms	Partly Cloudy	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Isolated Thunderstorms	AM Thunderstorms

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. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.*

Avocados: Mexico sent 50.7 million pounds to the U.S. last week, a 58% increase from the week before. The average dry matter is 26.9%. California harvested 9.7 million pounds and has an average dry matter of 29%. Peru sent 8.1 million pounds with dry matter around 25%.

Bananas: Banana supply will be stable, but production is being curtailed due to virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program. Bunker rates will be released this week and next; expect them to be higher due to rising fuel costs.

Pineapples: Supplies have started to tighten up, and we have seen an increase in open market pricing. Contract volume should hold firm, but open market availability has dropped. Suppliers are expecting this to last for 4 to 6 weeks. This should not affect quality, which has been good overall.

Table Grapes: Production is stable out of California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Autumn Ryals, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead and there may be supply issues on the back end of the season.

Berries

Strawberries: EXTREME Strawberry supplies remain extremely tight as California moves through a challenging seasonal production transition following prolonged July heat and an earlier-than-normal start to the season. Watsonville and Salinas volumes are declining faster than anticipated, while Santa Maria production is gradually increasing but is not yet sufficient to offset declining northern volume. Additional fruit harvested for processing has accelerated the reduction in fresh-market supplies, while stronger retail and foodservice demand as schools return to session is further widening the gap between supply and demand. Industry supplies could be reduced by as much as 50% over the next 2-3 weeks, creating the potential for continued tight availability and impacts to order fulfillment. Quality in Watsonville and Salinas is beginning to improve as cooler evening temperatures help fruit regain firmness and reduce bruising and softness, although smaller sizing and increased harvest selectivity continue to limit packable yields. Some deformity remains in early Santa Maria production, but quality is expected to improve as growers move further into the fall crop. Shelf life may remain reduced during the transition, making tighter inventory management advisable. Market conditions should begin improving during the first two weeks of September as Santa Maria fall production builds and additional volume from Baja California, Mexico, begins contributing to overall supplies.

Blackberries: WATCHLIST Blackberry availability continues to improve from Watsonville, where both conventional and organic supplies are increasing, and quality remains good. Current production levels are expected to remain steady throughout September, ensuring consistent domestic availability. Mexican production remains light due to suboptimal weather and is currently limited to Mexico's domestic market, with improved Mexican volumes not expected until September.

Raspberries: Raspberry supplies remain favorable as Watsonville production continues through its seasonal peak, with excellent firmness, flavor, and appearance. Mexican production is declining through August and is currently limited to Mexico's domestic market, leaving California as the primary source for U.S. availability. Mexican production is expected to rebound in September, while Watsonville should continue providing strong volume throughout August.

Blueberries: Availability is expected to begin declining in late August and into September as the domestic season winds down. The first Peruvian volumes have now arrived with excellent reported quality, although import volumes are expected to remain limited through August and September.

Citrus

Limes: ESCALATED Supply will get lighter, and we are seeing an upward tick in FOB prices across all sizes as the current region winds down production. We will continue to see size issues, with distribution skewing heavily toward 175s and 250s. Unfortunately, this is leaving larger sizes. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next several weeks. Overall quality will be a concern; external blemishes, oleocellosis and limited shelf life may occur.

Lemons: Small lemons are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve.

Navels: Finishing up, some suppliers are finished with Navels.

Valencias: California Valencias have begun and are projected to have strained supplies on small sizes.

Mandarins: Mandarins are finishing up and imports are coming in. Stay in contact with your supplier on other varieties or imports as alternative options.

Grapefruit: California grapefruit available.

West Coast Lettuce

Iceberg: WATCHLIST Lettuce quality and supplies are good. We have seen some reports of internal burn. We have added this item to the watchlist with the heat expected to become a factor affecting supplies and quality.

Iceberg VA: Quality and supplies are good.

Romaine & Romaine Hearts: WATCHLIST Supplies and quality are good. There have been reports of tip and fringe burn. Organic Hearts remain at the extreme level. We have added this item to the watchlist with the heat expected to become a factor affecting supplies and quality. Baby Romaine disease pressure is picking up, and supplies will be lighter as we go into next week.

Romaine VA: Quality and supplies are good. We are still seeing more core in the bags and some mildew.

Boston/Butter Lettuce: Quality and supplies look good.

Green Leaf, Better Burger and Red Leaf: Quality and supplies are good.

Green Bell Pepper: Supply is steady out of California; lighter supply out of the East due to ongoing rain and quality issues.

Color Bell Pepper: Good supply is available out of Fillmore/Somis, Baja, and South Georgia this week. Quality is outstanding on open-field varieties. The Hothouse Pepper category is steady out of Canada and Mexico. Overall quality is good.

Jicama: Stable supply and good quality available.

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

Mixed Chili Pepper: ESCALATED Supplies are stable on most varieties with steady volume crossing from Mainland Mexico, Baja and local programs in California, Mexico as well as the East Coast. Red Fresnos seem to be the shortest, and we are seeing much higher prices per pound than normal.

Tomatillo: Good supply and quality available this week.

Eggplant: Central Valley volume is steady while local programs in the East (Tennessee, North Carolina and Michigan) were limited this week. Overall quality is good.

Slicer Cucumbers: Supply crossing through Otay Mesa and McAllen will tighten up as heat has advanced those crops. In the East, we are seeing good supply out of Tennessee and Michigan. Quality is good from all shipping points. Expect to see some volatile markets and higher prices over the next 2-3 weeks.

English Cucumbers: Lighter supply and higher demand are pushing FOB prices upward out of Canada and Mexico. Quality is good.

Pickles: Lighter supply is available out of Tennessee/ North Carolina, with limited supply out of Mexico. Quality is good.

Green Beans: New York and other local regions in the East seem to be in good production this week. In the West, Orange County and Baja supplies are limited. Quality is mixed by region.

French Beans: WATCHLIST Overall French bean supplies remain adequate, although regional availability is mixed. The west is reporting good supplies of conventional volume from Mexico. Miami is seeing a slight decrease in Guatemalan production this week and next, but supplies are expected to improve within the next 7-10 days.

Zucchini/Yellow Squash: ESCALATED Very tight supply and higher demand have pushed pricing higher this week on Green and Yellow Squash out of Michigan, Virginia and California. We expect to see volatility in these markets over the next 2-3 weeks minimum and should see some price relief as growers break early fall blocks and production increases. Quality is good.

Herbs: WATCHLIST Basil production, quality, and supply remain good across both regions. On the East Coast, all herbs, including imported chervil, are readily available. On the West Coast, most herbs have steady supplies and fair quality, although chervil, Thai basil, and marjoram remain limited due to heat.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Steady	Steady	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	USA/MEX
Cilantro	Steady	Steady	Costa Rica
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/MEX
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA/MEX
Savory	Steady	Steady	USA
Sorrel	Steady	Steady	USA
Tarragon	Limited	Steady	MEX
Thyme	Steady	Steady	USA/MEX
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

Cantaloupe: Production remains strong as suppliers see high brix levels 14-16%, and vibrant color fruit. Fields are currently producing more 9s followed by 12s, while 15s are limited.

Honeydew: Sizing still favors 5s, 6s are limited, and 8s are hard to find. Suppliers are asking for flexibility on sizing. Overall, the quality remains strong with high brix levels between 13-15%.

Watermelon: The market has improved since new growing areas out in the east and north started harvesting. Production in the West has also increased but is still below levels from last year. Pricing has become steady as there are more supplies. Suppliers are reporting good quality throughout the growing regions.

Mixed Vegetables

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated.

Asparagus: EXTREME The asparagus market remains extremely active, with demand far exceeding available supply. Volumes are extremely tight across the industry, and daily prorations are occurring as shippers struggle to meet current demand. Most production is currently coming from Northern Peru, which will remain the primary growing region through August. Beginning in late August/early September, production will gradually transition to the southern growing regions of Peru. Production in Mexico remains very light and is expected to stay that way for the remainder of the month. Overall supply is expected to tighten further in the near term before additional Peruvian production begins providing some relief during the seasonal transition.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality is good, but supplies are tightening up. A few reports of browning and pin rot continue. Organic Crowns remain at the extreme level. With insect pressure increasing, we expect supplies to become very limited.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality is good, but supplies are limited.

Brussels Sprouts: Quality and supplies have improved.

Carrots (JUMBOS, MEDIUMS and CELLOS): Quality and supplies are good.

Cauliflower: WATCHLIST Quality and supplies are good. With insect pressure increasing, we will keep this item on the watchlist.

Celery: Quality and supplies are okay. Disease pressure, black heart, remains a factor and is affecting harvestable acres. Organic Celery is still at the extreme level. With school returning, demand is expected to increase, and the market will strengthen as we go into the fall.

Corn, Sweet: We are seeing improving supply out of the Northeast and Central Atlantic push prices down going into late August in preparation for Labor Day Promotions. In the west supply seems stable out of Oregon, California and Washington on Bi-Color and White; Yellow seems to be the shortest in the west. Quality is good out of all regions.

Fennel: ESCALATED Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Growers are holding to averages.

Kale: Quality and supplies look good.

Leeks: 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 markets are steady.

Green Cabbage: WATCHLIST Supplies and quality are good.

Green Onions: WATCHLIST Quality is good, but supplies are tightening up. Mexico has had extremely high temperatures. Yields are being affected.

Mushrooms: Promotional volume is available for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years, Canadian mushroom farmers received unfair subsidies, giving them a clear advantage over the domestic mushroom farming industry. The USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62–4.97%. These duties will be applied once the ruling is formally published. This will not only increase the price of imported mushrooms from Canada but will also put upward pressure on the price of domestically grown product as well. This is something domestic growers have been seeking some time to support increases in their operating costs over the past five years. We are also expecting to see domestic suppliers implement cost of living increases as the dust settles on the DOC rulings to compensate for increased growing costs, food safety, labor etc. Brought on by years of dumping practices out of Canada.

Napa Cabbage: Quality and supplies have improved.

Parsley (Italian & Curly): Quality and supplies are good.

Rapini: Quality is good, but supply continues to be light. The market is strong; therefore, supplies are expected to remain light.

Red Cabbage: Quality looks good, but supplies are light.

Spinach: WATCHLIST Supplies and quality look good but we are seeing rapid growth from the warmer weather which is resulting in larger leaf sizing and weaker texture. Insect activity has also increased. We are adding this item to the watchlist.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: WATCHLIST Pea supplies remain tight, particularly on snow peas. Guatemalan snow pea production is limited due to reduced crop growth caused by a lack of rain, while domestic snow pea supplies are also limited. Sugar snap availability is currently fair domestically, but Guatemalan supplies are beginning to decline as dry conditions continue to impact production. Near-term availability is expected to remain constrained, especially on snow peas.

Onions:

Washington, Oregon and Idaho have started harvesting as California finishes up its remaining onions. Overall, the market is still struggling to keep up with demand, keeping open market pricing elevated. As we get more production from the Northwest, the market will begin to stabilize in the next few weeks.

Potatoes: WATCHLIST

Old crop potatoes are almost finished, and most growers have begun harvesting the new crop. Overall acreage is down approximately 5%, while limited water availability and extended periods of high nighttime temperatures have put additional pressure on the crop. The early outlook indicates that larger 40–70 count potatoes will remain limited throughout the season, while smaller 80–120 count potatoes are expected to have good availability. Current market pricing remains elevated, but as more new crop potatoes become available, we anticipate pricing to gradually decrease.

Sweet Potatoes: WATCHLIST

Growers have started to harvest the new crop and will put them in storage to let the skin set before shipping. This will take 3-4 weeks before we start to see the new crop shipped out. Limited old crop supplies remain available nationwide, putting a premium on all sizes. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market. Quality has been fair to poor as we finish up the old crop.

Tomatoes:

Tomato Suspension Agreement Update

Currently, duties are being imposed on Mexican tomatoes. We do expect to see some reporting from the ITC on the impacts of duties and anti-dumping violations sometime this year. NO major immediate changes are anticipated.

East Coast

- **Round Tomatoes: ESCALATED** Volume remains light this week out of Tennessee and North Carolina, mostly due to rain delays. Quality is mixed out of all regions. Small fruit is short, possibly requiring size substitutions.
- **Roma Tomatoes:** Supply is steady, and quality is fair at best due to weather-related pressure.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Lighter volume this week on Grapes, Grape Medley, and Cherries due to transition and higher holiday demand. Markets are expected to remain active. Quality is fair at best.

Mexico

- **Round Tomatoes:** Supply will remain snug on larger-sized fruit this week. Quality is outstanding on what is crossing this week.
- **Roma Tomatoes:** Excellent supply and quality available out of Jalisco and Baja.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Grape Tomatoes and Cherries are very short this week due to lighter harvesting and higher demand. Medleys seem to be readily available. Quality on what is crossing the border has been good across all varieties.

California

- Supply has been fairly stable on rounds however larger sizes seem to be limited and drawing a premium. Romas are stable as well. General call prices are up this week as demand from the east was higher due to the ongoing rain in Central Tennessee and surrounding areas. Quality is very nice out of California currently on mature greens and vine ripens.

Other Fruit:

Apples: As we move through the summer storage season, Washington Apple inventories continue to trend below both last year and historical averages across many key varieties, supporting the firm pricing environment that has developed throughout 2026. According to the most recent storage reporting, total conventional Apple inventories stood at 39.4 million cartons, down 12% from 44.9 million cartons last year and slightly below the three-year average of 40.4 million cartons. The market will remain elevated until new crop Apples start in August.

Pears: D'Anjou availability is limited; volume from both domestic and imports have dried up. The market remains stable, with new crop Bartletts. Red D'Anjou Pears are moderately available in U.S. #1 35–55ct sizes and should remain in the market for another couple weeks. Bosc Pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Limited supply out of Mexico.

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

Cherries: Lighter supply out of Washington State, New York and Canada.

Stone Fruit: Steady supply out of California and other local regions.

Papaya: Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

Mangoes: Steady supply out of Mexico, Peru and Puerto Rico. Varieties: Keitts and Mingolos.

Kiwi Fruit: Supplies are fair out of Chile.

Quince: Limited supply available this week.