

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, but demand is much higher. 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 across most varieties. Zucchini/Yellow Squash were both tight this week as well as slicer cucumbers. 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 affect 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.

Weather events 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 Salinas season, with Leafy Greens, Broccoli and Cauliflower being the items most likely affected. Artichokes, Cauliflower, Cilantro, Green Onions and Spinach are limited due to ongoing supply constraints. Cauliflower and Green Onions will likely have prorates. A market alert was sent out on Green Onions.

The Avocado market remains stable with solid volume from Mexico, California and Peru. Flat demand is another reason the market is stable. The size curve out of Mexico has shifted and now favors 48ct. 60ct and smaller 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 has increased as retailers are promoting both melons for the Labor Day holiday weekend and beyond. Pricing has moved up, and we should expect to see slightly higher pricing moving forward. Production and quality remain strong.

Berry markets remain mixed as key growing regions move through seasonal production transitions. Overall supply remains constrained, with declining output in established regions occurring before newer production areas reached full volume. Quality ranges from fair to excellent, although some softness, bruising, and smaller fruit are being reported. Availability should begin improving across several categories from late September into October, but near-term supply will remain limited.

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 a mixed bag with some suppliers anticipating a potential gap in supplies and others sitting comfortably. Be in close contact with your supplier on this matter.

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.

El Niño: While it's still too early to predict how severe the impacts of El Niño will be, we do know that impactful storms will likely hit the Central Coast. We will be adding updates as we receive them but for now, all indicators are pointing towards a strong El Niño taking shape over the next several months. Yuma will likely see increased precipitation, so growers are planning to place crops across various growing regions to try and mitigate supply issues. The growers do have plans in place and will be acting accordingly to try and minimize the effects of the weather event as much as they can.

Alert List

- Asparagus – **EXTREME**
- Artichokes – **EXTREME**
- Brussels Sprouts – **ESCALATED**
- Cauliflower – **ESCALATED**
- Cilantro – **ESCALATED**
- Green Onions – **ESCALATED**
- Lettuce Wrapped/Trimmed – **ESCALATED**
- Lettuce – **ESCALATED**
- Limes (150's and larger) – **ESCALATED**
- Spinach – **ESCALATED**
- Strawberries – **EXTREME**
- Squash, Zucchini and Yellow – **ESCALATED**
- Sugar Snap Peas – **ESCALATED**
- Tomatoes, Rounds and snacking varieties – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List

1. Blackberries
2. Broccoli
3. Broccolini
4. Cabbage, Green
5. French Beans
6. Herbs
7. Romaine
8. Ginger
9. Small Citrus Sizes across all Varieties
10. Spring Mix
11. Potatoes
12. Sweet Potatoes

Weather

SALINAS, CA 36.678, -121.656							
Thu 9/3  82° / 59°F Mostly Sunny	Fri 9/4  79° / 61°F Sunny	Sat 9/5  80° / 63°F Mostly Sunny	Sun 9/6  80° / 61°F Mostly Sunny	Mon 9/7  80° / 60°F Mostly Sunny	Tue 9/8  76° / 60°F Mostly Sunny	Wed 9/9  81° / 60°F Partly Cloudy	Thu 9/10  81° / 63°F Mostly Sunny
BAKERSFIELD, CA 35.373, -119.019							
Thu 9/3  83° / 61°F Mostly Sunny	Fri 9/4  84° / 63°F Partly Cloudy	Sat 9/5  81° / 62°F Sunny	Sun 9/6  79° / 62°F Mostly Sunny	Mon 9/7  83° / 61°F Sunny	Tue 9/8  83° / 60°F Cloudy	Wed 9/9  81° / 60°F Sunny	Thu 9/10  83° / 64°F Mostly Sunny
OXNARD, CA 34.197, -119.177							
Thu 9/3  87° / 66°F Sunny	Fri 9/4  81° / 61°F Sunny	Sat 9/5  85° / 63°F Light Rain	Sun 9/6  82° / 61°F Mostly Sunny	Mon 9/7  80° / 60°F Cloudy	Tue 9/8  79° / 60°F Cloudy	Wed 9/9  83° / 61°F Sunny	Thu 9/10  84° / 64°F Sunny
JALISCO / NAYARIT 20.950, -104.300							
Thu 9/3  88° / 68°F Partly Cloudy	Fri 9/4  88° / 70°F Mostly Sunny	Sat 9/5  86° / 69°F Sunny	Sun 9/6  93° / 70°F Mostly Sunny	Mon 9/7  86° / 70°F Sunny	Tue 9/8  90° / 73°F Mostly Sunny	Wed 9/9  90° / 71°F Cloudy	Thu 9/10  88° / 66°F Partly Cloudy
VIZCAINO, BAJA SUR 27.167, -113.383							
Thu 9/3  85° / 69°F Mostly Sunny	Fri 9/4  86° / 64°F Partly Cloudy	Sat 9/5  90° / 66°F Sunny	Sun 9/6  86° / 68°F Sunny	Mon 9/7  86° / 69°F Sunny	Tue 9/8  89° / 65°F Mostly Sunny	Wed 9/9  84° / 66°F Cloudy	Thu 9/10  83° / 63°F Partly Cloudy
TORREON, COAHUILA 25.543, -103.407							
Thu 9/3  86° / 68°F Cloudy	Fri 9/4  90° / 67°F Sunny	Sat 9/5  89° / 69°F Partly Cloudy	Sun 9/6  88° / 69°F Cloudy	Mon 9/7  84° / 65°F Cloudy	Tue 9/8  85° / 68°F Cloudy	Wed 9/9  91° / 66°F Sunny	Thu 9/10  87° / 68°F Cloudy
EVENSVILLE, TN 35.626, -84.960							
Thu 9/3  82° / 61°F Partly Cloudy	Fri 9/4  84° / 63°F Partly Cloudy	Sat 9/5  82° / 64°F Light Rain	Sun 9/6  79° / 63°F Cloudy	Mon 9/7  82° / 64°F Mostly Sunny	Tue 9/8  84° / 64°F Mostly Sunny	Wed 9/9  80° / 62°F Sunny	Thu 9/10  78° / 59°F 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. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.*

Avocados: Mexico sent 44.9 million pounds to the U.S. last week; the average dry matter is 27%. California harvested 7.9 million pounds and has an average dry matter of 29%. Peru sent 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, Scarlett Royals, Allisons, 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. Black grapes will start to decline over the next 3-4 weeks.

Berries

Strawberries: EXTREME Strawberry supplies remain tight as production continues to transition between California growing regions. Santa Maria volumes are increasing week over week but remain insufficient to meet current demand, while Watsonville and Salinas production continues to decline. Overall quality is good, although some bruising, soft skin, crooked fruit, and smaller sizing are being reported. Santa Maria production is expected to increase more significantly in the coming weeks, which should gradually improve availability.

Blackberries: WATCHLIST Blackberry availability remains limited across both Mexico and Watsonville. Mexican quality is good despite unfavorable weather conditions, while Watsonville quality is mixed, with some soft fruit being reported. Watsonville volumes are expected to remain reduced through mid-September before increasing from late September into early October. Mexican production should improve more significantly during October, providing additional market relief.

Raspberries: Raspberry quality remains good, with favorable color, firmness, flavor, and overall appearance reported across the primary growing regions. Mexican production has been declining but is expected to rebound during September as shipments transition through Texas. Watsonville availability will continue decreasing week over week for the remainder of its season. Near-term supplies may remain limited until increasing Mexican production can offset the seasonal decline in California.

Blueberries: Blueberry production in the Pacific Northwest is gradually declining, with fair-to-good quality and increasingly limited fruit remaining in the fields. Production from this region is expected to continue at reduced levels over the next several weeks. New arrivals from Peru are showing excellent quality, but volumes remain limited during the August-to-September transition. Peruvian supply is increasing and should help offset the seasonal decline in domestic production.

Citrus

Limes: ESCALATED Supply will slowly turn the corner over the coming weeks, and we should see some relief on fob prices in general across all sizes. We will continue to see size issues, with distribution skewing heavily toward 150s and 250s. Unfortunately, this is limiting 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 continue to 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: ESCALATED Lettuce quality is okay and supplies are limited. There has been an increase of disease and insect pressure. We have seen some reports of internal burn, wind burn and soil-related defects. The market is trending up. September will be challenging for lettuce. Lettuce is now escalated.

Iceberg VA: ESCALATED Quality and supplies are okay.

Romaine & Romaine Hearts: WATCHLIST Supplies and quality are okay. There have been reports of tip and fringe burn. This item remains on the watchlist and is expected to escalate soon. We are seeing high core, soil concerns, and insect pressure. Yields are being affected. Baby Romaine disease pressure has also increased, and supplies will be light.

Romaine VA: Quality and supplies are okay. 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 outside of California. Lighter supply out of the East due to ongoing rain and quality issues, we are seeing upward pressure on open market business. Greens in the desert are expected to start in 6 weeks.

Color Bell Pepper: Good supply is available out of Fillmore/Somis, Gilroy, Baja, and Tennessee this week. However, markets are expected to firm up a tad late next week on yellow. Red is flushing with outstanding quality on open-field varieties. The Hothouse Pepper category is steady out of Canada and Mexico while Open field Canadian is flushing as well.

Jicama: Lighter 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, as well as the East Coast. Red Fresnos seem to be the shortest, and we see 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: Supplies crossing through Otay Mesa and McAllen are much improved with stable volume available. In the East, we are seeing good supply out of Tennessee and Michigan. Quality is good from all shipping points.

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, Round Type: 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. Pole beans, Kentucky Wonders and Half Runners are much higher.

French Beans: WATCHLIST Production from Guatemala continues to increase, while French bean supplies from Mexico remain good.

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 13-15%, and vibrant color fruit. Fields are currently producing more 9s followed by limited 12s and 15s.

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 12-14%.

Watermelon: The market remains stable with most of the volume coming out of the Midwest. California is still producing some volume along with Mexico. Pricing is steady as suppliers get ready for one last holiday push. Quality throughout the growing regions has been good.

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 continuing to exceed supply. Although Southern Peru (Ica) has opened fields, supply is not expected to normalize until mid-September into early October. Very strong El Niño conditions continue to cause increased temperatures, which in turn causes smaller sizing, spreading and feathered tips. Production in Mexico remains very light and is expected to stay that way for the remainder of the month. Supply is expected to remain low, especially on the bigger sizes, until Ica and Southern Baja production ramps up.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality is good, but supplies are tightening up. Reports of browning and pin rot continue. Organic broccoli remains at the extreme level. With increasing insect pressure, we expect supplies to become very limited. The market is rising.

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

Brussels Sprouts: ESCALATED Quality is good, but supplies have tightened up.

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

Cauliflower: ESCALATED Quality is okay. Supplies have become extremely limited. Prorates should be expected from some growers. Insect pressure has increased drastically and is affecting yields.

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

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 tightened back up out of Oregon, California and Washington on bi-color and white; Yellow seems to be the shortest in the West. We are seeing a split market based on regions; quality is good out of all regions.

Fennel: Quality and supplies have improved.

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 Quality looks good, but supplies are tightening up. The market is rising.

Green Onions: ESCALATED Quality is good, but supplies are extremely limited. Growers will be holding to strict averages when they can but prorates should be expected. MX has had monsoon-type weather and triple digit 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 for 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: ESCALATED 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.

Spring Mix: WATCHLIST Supplies and quality look good, but we are starting to see some decreased shelf-life.

Snow Peas and Sugar Snaps: WATCHLIST Guatemalan snow pea production remains flat due to insufficient rainfall. Sugar snap pea supplies are extremely limited, and markets have strengthened as expected. Domestic availability of both snow peas and sugar snap peas also remains limited.

Onions:

The transition to the NW, Washington, Oregon, and Idaho is mostly done. Most California suppliers are finished for the summer season. Overall, the market is still struggling to keep up with demand, elevating open market pricing. NW suppliers are reporting less volume on colossal and super colossal sizing due to extended periods of smoke from neighboring wildfires and heat.

Potatoes: WATCHLIST

Most growers are shipping new crop potatoes, and some will start adding volume into storage in the upcoming weeks. With less acreage, issues with water and high nighttime temperatures larger 40–70 count potatoes are limited and will remain that way throughout the season. Suppliers are still hoping that potatoes will size up over the next few weeks. Smaller 80–120 count potatoes have better availability. Current market pricing remains elevated and getting stronger on bigger potatoes.

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, particularly on larger sized fruit out of Tennessee and North Carolina, mostly due to rain delays and quality. Quality is mixed out of all regions. Georgia should start scratching in approximately 10 days.
- **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 Cherries, Grapes and Medley volume will be steady. Markets will tighten up as season peaks start to wind down over the next two weeks. Quality is fair at best. We should see transition to Georgia over the next 10-12 days.

Mexico

- **Round Tomatoes: ESCALATED** 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 ripers.

Other Fruit:

Apples: 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. New crop Gala apples are being harvested, and inventory is building up. Granny Smiths are limited as they finish up storage crop, new crop will start in 3 weeks. Red Delicious, Fuji and Gold Delicious all have very limited storage supplies left, and new crop will start in mid to late September. New crop Honeycrisp apples have started, and good volume is available.

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 Peru.

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: Tommy's, Ataulfo, Keitts and Haden.

Kiwi Fruit: Supplies are fair out of Chile.

Quince: Limited supply available this week.

Figs: Black Mission and Brown Turkey available out of California.