

Overview

Tomato production continues to fluctuate in South Carolina, Tennessee, and Virginia due to a combination of weather-related pressure and the season starting to wind down, resulting in upward pressure on the markets this week. Snacking Tomatoes remain the tightest over the coming weeks and we expect to see some relief once South Georgia starts in approximately 12 days. We are watching a storm off the coast of Baja that could impact the fall vegetable crop in Southern Baja and possibly Sonora. We will continue to assess this storm's path and update once it has passed. Mexico's production of Rounds and Romas remains steady; Grapes will be lighter this week due to transitioning to new blocks. Mexican growers expect stable production and good quality over the next few weeks. Demand will be strong with a deficit out of the East. 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 in price and volume decline. New crop will be significantly different, leaning heavily to smaller fruit. 150s 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 affecting the industry over the coming weeks. In addition to these increases, we will also see costs rise across the domestic supply chain, which mostly impacts growing and operating costs.

Hurricane Polo Assessment: We are assessing the impacts of Hurricane Polo as it has crossed through Baja, then hit Sonora, Mexico. There will be some short-term effects of this storm on the fall vegetable/melon crop grown in these regions. Some items that could be impacted: Bell Peppers and Squash are grown for later part of Q4, potentially Melons, Hot Peppers, etc. We will continue to assess the path of this storm and update once it has passed.

Insect pressure, INSV, and Sclerotinia continue to impact production and are expected to remain a challenge throughout the Salinas season. Demand is increasing, and supplies have become extremely limited. Quality issues are also on the rise as disease and insect pressure continue to increase, particularly in Leafy Greens (Lettuce, Romaine, Green Leaf, etc.) Cabbage, Broccoli, and Cauliflower. Diamondback Moth/insect pressure is heavy and is a large contributor affecting Cabbage, Broccoli and Cauliflower supplies. Growers are expected to hold to averages on all Lettuce, Romaine, Broccoli, Cabbage and Cauliflower commodities when they can, but prorates should be expected. Some of these prorates may be severe. Green Onions are also still extremely limited and will likely be prorated. We are approximately 7 weeks away from transition and supplies/quality will be challenging until we settle into Yuma.

Avocado industry supply conditions remain stable as Mexico increases production and becomes the primary source through the end of the year, while California production and Peruvian arrivals wind down. Availability is concentrated in medium and large fruit, particularly 48-count, supporting favorable promotional opportunities, while smaller fruit remains limited with firm pricing and Mexican jumbo fruit continues to command a premium. Mexico's transition into the main-season Avenajada crop is expected to maintain a similar size profile, although ongoing rainfall could temporarily reduce harvest volumes. Remaining California and Peruvian supplies are primarily larger fruit, offering additional promotional opportunities as their seasons conclude. Supply is expected to remain steady heading into October, with the strongest promotional opportunities centered on 48-count fruit. California cantaloupe and honeydew production is expected to continue through at least next week, although virus pressure in late-season fields could bring the Central California season to an earlier conclusion than the originally planned week of October 12. Yuma program is scheduled to begin that week with limited initial production, while the impact of recent Arizona rainfall is still being assessed. Sizing has shifted smaller due to weaker fields, cooler temperatures, and reduced daylight, with larger fruit already commanding premium pricing. Internal quality remains consistent, with strong sugar levels. Availability may be tight during the regional transition, particularly larger sizes.

Berry supplies remain constrained as domestic production winds down and imported volumes remain limited. Quality is generally good, although isolated softness and heat-related defects continue to affect some growing regions. Increasing Mexican production should provide some relief in October, while limited Peruvian arrivals will keep availability tight, particularly for organic blueberries. Overall supply improvement is expected to be uneven across the category in the coming weeks.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including Lemons and Oranges, with fruit generally trending larger. California Valencia's 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 to mitigate supply issues. The growers do have plans in place and will be acting accordingly to try to minimize the effects of the weather event as much as they can.

Alert List

- Asparagus – **EXTREME**
- Artichokes – **EXTREME**
- Boston/Butter Lettuce – **ESCALATED**
- Broccoli Florets/Crowns – **EXTREME**
- Broccolini – **ESCALATED**
- Brussels Sprouts – **ESCALATED**
- Cabbage – **ESCALATED**
- Cauliflower – **ESCALATED**
- Cilantro – **ESCALATED**
- Green Onions – **EXTREME**
- Green Leaf – **ESCALATED**
- Lettuce – **EXTREME**
- Limes (150s and larger) – **ESCALATED**
- Red Leaf – **ESCALATED**
- Romaine Hearts – **ESCALATED**
- Spinach – **ESCALATED**
- Squash, Zucchini and Yellow – **ESCALATED**
- Snow Peas – **EXTREME**
- Sugar Snap Peas – **ESCALATED**
- Tomatoes, Rounds, Romas and Snacking Varieties – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List

1. Blackberries
2. French Beans
3. Herbs
4. Ginger
5. Small Citrus Sizes across all Varieties
6. Spring Mix
7. Potatoes
8. Raspberries
9. Strawberries
10. Sweet Potatoes
11. Warm Veg – Western Mexico: Bell Pepper, Eggplant, Soft Squash, Cucumber

Weather

SALINAS, CA 36.678, -121.656							
Thu 10/1  77° / 55°F Sunny	Fri 10/2  70° / 54°F Sunny	Sat 10/3  71° / 53°F Sunny	Sun 10/4  72° / 51°F Sunny	Mon 10/5  75° / 53°F Partly Cloudy	Tue 10/6  74° / 54°F Light Rain	Wed 10/7  76° / 54°F Sunny	Thu 10/8  71° / 54°F Mostly Sunny
BAKERSFIELD, CA 35.373, -119.019							
Thu 10/1  74° / 54°F Sunny	Fri 10/2  75° / 54°F Mostly Sunny	Sat 10/3  71° / 53°F Sunny	Sun 10/4  70° / 53°F Partly Cloudy	Mon 10/5  78° / 55°F Sunny	Tue 10/6  76° / 53°F Cloudy	Wed 10/7  74° / 51°F Partly Cloudy	Thu 10/8  71° / 51°F Sunny
OXNARD, CA 34.197, -119.177							
Thu 10/1  74° / 55°F Partly Cloudy	Fri 10/2  76° / 57°F Light Rain	Sat 10/3  76° / 57°F Mostly Sunny	Sun 10/4  77° / 55°F Cloudy	Mon 10/5  76° / 56°F Partly Cloudy	Tue 10/6  72° / 52°F Sunny	Wed 10/7  72° / 53°F Cloudy	Thu 10/8  75° / 56°F Partly Cloudy
SANTA MARIA, CA 34.953, -120.436							
Thu 10/1  78° / 58°F Partly Cloudy	Fri 10/2  73° / 54°F Sunny	Sat 10/3  71° / 54°F Mostly Sunny	Sun 10/4  75° / 54°F Mostly Sunny	Mon 10/5  69° / 54°F Cloudy	Tue 10/6  71° / 54°F Mostly Sunny	Wed 10/7  76° / 52°F Cloudy	Thu 10/8  74° / 52°F Mostly Sunny
JALISCO / NAYARIT 20.950, -104.300							
Thu 10/1  82° / 65°F Sunny	Fri 10/2  83° / 67°F Mostly Sunny	Sat 10/3  82° / 66°F Mostly Sunny	Sun 10/4  81° / 64°F Sunny	Mon 10/5  86° / 63°F Sunny	Tue 10/6  85° / 67°F Light Rain	Wed 10/7  85° / 65°F Mostly Sunny	Thu 10/8  82° / 63°F Mostly Sunny
VIZCAINO, BAJA SUR 27.167, -113.383							
Thu 10/1  85° / 60°F Mostly Sunny	Fri 10/2  83° / 60°F Mostly Sunny	Sat 10/3  78° / 60°F Mostly Sunny	Sun 10/4  76° / 59°F Partly Cloudy	Mon 10/5  79° / 58°F Partly Cloudy	Tue 10/6  80° / 58°F Cloudy	Wed 10/7  76° / 58°F Mostly Sunny	Thu 10/8  79° / 59°F Sunny

TORREON, COAHUILA 25.543, -103.407							
Thu 10/1  83° / 60°F Cloudy	Fri 10/2  83° / 64°F Cloudy	Sat 10/3  80° / 61°F Mostly Sunny	Sun 10/4  81° / 60°F Light Rain	Mon 10/5  85° / 62°F Mostly Sunny	Tue 10/6  80° / 58°F Partly Cloudy	Wed 10/7  80° / 59°F Mostly Sunny	Thu 10/8  80° / 62°F Mostly Sunny
EVENSVILLE, TN 35.626, -84.960							
Thu 10/1  77° / 53°F Sunny	Fri 10/2  76° / 54°F Partly Cloudy	Sat 10/3  75° / 57°F Cloudy	Sun 10/4  76° / 56°F Sunny	Mon 10/5  75° / 56°F Mostly Sunny	Tue 10/6  72° / 54°F Partly Cloudy	Wed 10/7  76° / 53°F Cloudy	Thu 10/8  74° / 52°F Mostly Sunny

Fruits & Vegetables

Tariff Update: President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.

Avocados: Mexico will remain the primary source of supply through the end of the year, with availability currently skewed toward larger sizes, particularly 48s and larger. Smaller fruit remains limited, and ongoing rainfall in Mexico could reduce harvest volumes. California's season is winding down rapidly, with limited supplies expected through October. Although last week's shipments were slightly higher than anticipated, volumes are expected to continue declining in the coming weeks.

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 tightened up, and we have seen an increase in open market pricing. Contract volume is holding firm, but open market availability has dropped. Suppliers are expecting this to last for 2 to 4 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, Scarlet Royals, Allison's, 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 of schedule 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: WATCHLIST Supplies remain constrained as Santa Maria volumes plateau and Watsonville/Salinas production declines with the season winding down. Quality is good to fair, with bruising and misshapen fruit reported in Santa Maria and isolated pin rot and mildew in Watsonville/Salinas. Crews continue removing subpar fruit, and near-term availability is expected to remain limited.

Blackberries: WATCHLIST Availability remains limited, although Mexican conventional production is expected to increase more significantly in October, with shipments transitioning directly to Texas. Organic production in Mexico is beginning with light volumes, while Watsonville organic supplies are expected to decline. Quality is generally good, with some softness and leaking in Mexico and heat-related softness and sunburn in Watsonville.

Raspberries: WATCHLIST Supplies remain limited as Watsonville production begins declining in early October. Mexican volumes are expected to increase more significantly this month, with shipments transitioning directly to Texas. Quality is generally good, although some soft and leaky fruit is being reported in Mexico, along with softness and sunburn in Watsonville.

Blueberries: Supplies are tightening as Pacific Northwest production declines rapidly and the British Columbia season concludes. Conventional arrivals from Peru are expected to remain steady but limited through October, while organic availability will be particularly tight due to a two-week gap in arrivals before light volumes resume. Quality remains good in the Pacific Northwest and excellent on arrivals from Peru.

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. Currently we continue to battle sizing issues on new crop, with distribution skewing heavily toward 200s and smaller. Unfortunately, this is limiting larger sized fruit and there is a need to substitute with smaller sizes. We will continue to see this until the size curve stabilizes. 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: Domestic Navels are all wrapped up.

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

Mandarins: Import Mandarins are in full swing. Domestic mandarins will begin this November.

Grapefruit: California grapefruit has mixed availability.

West Coast Lettuce

Iceberg: EXTREME Lettuce quality is fair and supplies are extremely limited. Prorates should be expected. There has been an increase of disease and insect pressure. We have seen some reports of internal burn, wind burn and soil-related defects. We are also seeing smaller heads and light weights. The market continues to rise quickly. The rest of the Salinas season will be challenging for lettuce. Lettuce remains at the extreme trigger.

Iceberg VA: EXTREME Quality is fair and supplies are extremely limited. Prorates should be expected.

Romaine & Romaine Hearts: ESCALATED Supplies and quality are fair. There have been reports of light weights, tip and fringe burn. 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. All Romaine items are escalated. Growers are holding to strict averages.

Romaine VA: ESCALATED Quality and supplies are fair. We are still seeing more core in the bags and some mildew. Growers are holding to strict averages.

Boston/Butter Lettuce: ESCALATED Quality is good, but supplies are limited.

Green Leaf, Better Burger and Red Leaf: ESCALATED Quality is fair and supplies are limited.

Green Bell Pepper: WATCHLIST Supply is steady outside of California; Coachella is about two weeks out. Lighter supply out of the East due to ongoing rain and quality issues. We are seeing upward pressure on open market business.

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 this week on red and 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. Yellow Pepper seems to be the shortest this week.

Jicama: Good supply and good quality available.

Mini Sweet Pepper: Supply lighter this week and expected for the next several weeks. Quality is good.

Mixed Chili Pepper: Supplies are lighter this week on several varieties: Poblano, Thai Chili and Serrano. Mainland Mexico, Baja and local programs in California remain the primary growing areas 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: WATCHLIST 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: WATCHLIST 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: Steady supply and softer markets are putting downward pressure on the spot market this week out of Mexico and Canada. Quality is good.

Pickles: Lighter supply is available out of Georgia Florida, Michigan and Mexico this week. Markets remain firm and 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 and much higher in price versus the East. Quality is mixed by region. Pole beans, Kentucky Wonders and Half Runners are much higher.

French Beans: WATCHLIST Supplies of organic and conventional French beans from Guatemala, along with conventional French beans from Mexico, are tightening as lower broccoli volumes and increased fall demand drive stronger demand. Overall production remains below normal levels, and higher pricing is expected in the coming weeks.

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 at minimum, and we 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, tarragon, 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	Limited	Steady	MEX
Cilantro	Limited	Steady	USA/MEX
Cilantro	Steady	Steady	Costa Rica
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Limited	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: With the change in seasons approaching, growers are producing more 12s and 15s than before. 9s are still readily available. Quality is still strong with high color and high brix levels. We should be transitioning to the desert over the next 10 to 14 days.

Honeydew: Sizing still favors 5s; 6s are limited, and 8s are hard to find. Overall supplies remain tight, and suppliers are asking for flexibility on sizing. Quality remains strong with high brix levels between 12-14%. Mexican production will start soon, and we should see some relief in the market. We should be transitioning to the desert over the next 10 to 14 days.

Watermelon: The market is starting to transition late-season US crop from Texas and Georgia to imports. Most imports will start coming from Mexico. Pricing is steady even with lower supplies as demand tapers off. 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 available supply. New fields continue to open in Ica, Southern Peru. Although sizing is beginning to improve, overall volume remains limited. Mexican production is also extremely light and is expected to remain constrained for several more weeks. Initial reports indicate that fields in Mexico did not sustain significant damage from the hurricane, and supply is expected to continue increasing. However, pricing pressures will likely continue until production from Ica and Southern Baja ramp up fully. Overall sizing remains smaller across all sizes.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: EXTREME Quality is fair and supplies are extremely limited. Reports of browning and pin rot continue. With the heavy insect pressure, prorates should be expected. All broccoli is now at the extreme level.

Broccolini and Sweet Baby Broccoli: ESCALATED Quality is good, but supplies are now extremely limited. Growers are holding to strict averages when they can but prorates should be expected.

Brussels Sprouts: ESCALATED Quality is good and supplies have improved but remain limited.

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

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

Celery: Quality and supplies are good. Organic Celery is at the extreme level.

Corn, Sweet: We are seeing a split market with good supply available in the East while the West markets remain lighter than usual as we transition back to California, which is the primary shipping point for the West Coast. In the East, we continue to see steady numbers out of Georgia, North Carolina and upper Midwest. Local availability will start to decline as we see cooler weather move into the upper Midwest and Northeast this week. 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: ESCALATED Quality looks good, but supplies are tightening up. Prorates should be expected. The market is rising and there is heavy insect pressure that is reducing harvestable yields.

Green Onions: EXTREME Quality is fair. We are seeing insect damage and small sizing. 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 continues to see rain. Yields are being drastically affected. We expect Green Onions to remain limited until November.

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 are good.

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: ESCALATED Quality looks good, but supplies are light.

Spinach: ESCALATED Quality is good, but supplies are tightening up. October is expected to be a roller coaster for this item. Insect activity has increased and yields will be affected.

Spring Mix: ESCALATED Supplies are limited and quality is okay. We are starting to see some decreased shelf-life. All leafy greens are affected by disease pressure.

Snow Peas and Sugar Snaps: ESCALATED Supplies of Guatemalan snow peas and sugar snap peas remain extremely limited, resulting in a highly active market. Domestic availability is also constrained due to weather-related disruptions and ongoing field transitions. Tight supplies and elevated pricing are expected to continue for the next several weeks. Snow Peas are the extreme trigger.

Onions:

The transition to the NW, Washington, Oregon, and Idaho is done. 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

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 couple of 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.

Q4 Updates: *Quarter 4 is upon us, and we need to remember this can be the most challenging time of year for the tomato supply chain with local and seasonal production winding down for the season. We will begin transitioning to Florida in the coming weeks as well as Mainland Mexico for the winter months; with a forecasted Super El Niño season expected we want to be prepared for any vulnerability to weather related pressure on supply. We will continue to monitor the weather in all growing regions as well as receive updates from our grower partners and provide that information to you as soon as possible.*

East Coast

- **Round Tomatoes: ESCALATED** Volume is mixed this week and still short 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: ESCALATED** Supply will be lighter this week as production starts to decline on late summer plantings; South Georgia is expected to start in the next two weeks. 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 will start in 14 to 21 days.

Mexico

- **Round Tomatoes: ESCALATED** Supply will be tighter on all sizes this week, particularly the larger sized fruit. This scenario, combined with overall higher demand, will keep prices higher this week. Quality is outstanding on what is crossing this week.
- **Roma Tomatoes: ESCALATED** Stable supply and quality available out of Jalisco and Baja. Demand is very good this week putting upward pressure on prices. The driver for this is high demand from the East and lower production numbers out of 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 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: New crop Gala apples are being harvested, and inventory is building up. Granny Smiths are reported to have good sizing available. Red Delicious sizing is on the larger end 56-80ct. Fuji and Gold Delicious both have very limited storage supplies left, and new crop will start soon. 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 of weeks. Bosc Pears are currently gapping until their respective new crop harvests.

Persimmons: New crop FUYUs available out of California.

Pomegranate: Good supply available; New Crop out of California.

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

Cherries: None or very limited supply available. Quality is not the best and will not improve until offshore starts.

Stone Fruit: Peaches and Nectarines are winding down out of California and other local regions. Good supply is still available on late season plums.

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

Mangoes: Steady supply out of Mexico and Brazil. Varieties: Tommy's, Kents, Palmer and Keitts.

Kiwi Fruit: Supplies are fair out of Chile; California Kiwi Berries available. Some golden kiwis are also available.

Quince: Limited supply available this week.

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