

Overview

Tomato production continues to decline out of South Carolina, Tennessee, and Virginia due to a combination of weather-related pressure and the season coming to a close. We will continue to see upward pressure on the markets this week, particularly Snacking Tomatoes, which are the tightest, and there is a good chance, we will see some supply interruptions over the next three weeks. 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 is going to be lighter this week and combined with higher demand out of the East, we are seeing higher markets. Grapes, Cherries, and Snacking Tomatoes will be lightest this week due to transition gaps in the east between summer and fall crops while import numbers are down for the next few weeks, pushing the market very high. We do expect some supply interruptions over the next three weeks and may need to sub over to other Tomato items. In California, Tomato production remains steady, but demand is much higher. We do expect the season to wind down over the next couple of weeks when production should then be reliant on Mexico and Florida. The Lime market remains firm on all sizes, current forecasts call for smaller fruit to be the majority of production with 175s and larger still extremely limited, and substitutions with smaller sizes are 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. Steady production is expected on 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, which sustained damage to production in Ciudad Constitucion as well as Vizcaino, but it was Guaymas and San Carlos on the mainland that experienced significant damage while Hermosillo was saved. The short-term effects of this storm on the fall vegetable and Melon crop will be significant over the coming weeks we feel mostly in the Melon deal.

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 and Cabbage 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 6 weeks away from transition and supplies/quality will be challenging until we settle into Yuma.

Avocado supplies remain stable as strong Mexican production supports the transition away from California and Peru. The shift from Loca to Aventajada is expected to proceed smoothly, maintaining consistent availability throughout the fall. Medium and large fruit offer the strongest promotional opportunities, while jumbo (40s & larger) availability is improving but remains priced at a premium. Steady demand and continued Mexican harvests are expected to support balanced markets and promotional opportunities through October and November.

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 availability remains uneven as domestic production winds down and imported supplies build. Recent heat has reduced marketable volumes and increased quality concerns, particularly for Strawberries, creating upward pricing pressure and a greater risk of reduced shelf life. Increasing Raspberry and Blackberry production in Mexico is supporting availability, while Peruvian Blueberries offer excellent quality despite limited volumes and gaps in organic arrivals. Near-term supply challenges are expected to persist, with Strawberry constraints potentially continuing through December and Blueberry availability improving as Mexico and Chile contribute additional volume.

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 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 – **EXTREME**
- Broccoli Florets/Crowns – **EXTREME**
- Broccolini – **ESCALATED**
- Brussels Sprouts – **ESCALATED**
- Cabbage – **ESCALATED**
- Cauliflower – **ESCALATED**
- Cilantro – **ESCALATED**
- Green Onions – **EXTREME**
- Green Leaf – **EXTREME**
- Lettuce – **EXTREME**
- Limes (175's and larger) – **ESCALATED**
- Napa – **ESCALATED**
- Parsley Italian – **ESCALATED**
- Red Leaf – **EXTREME**
- Romaine/Romaine Hearts – **EXTREME**
- Spinach – **ESCALATED**
- Squash, Zucchini and Yellow – **ESCALATED**
- Strawberries – **ESCALATED**
- Snow Peas – **EXTREME**
- Sugar Snap Peas – **ESCALATED**
- Tomatoes, Rounds, Romas – **ESCALATED**
- Tomatoes, Grape and Cherry (Snacking) – **EXTREME**
- 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 10/8	Fri 10/9	Sat 10/10	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15
 68° / 51°F Partly Cloudy	 74° / 52°F Partly Cloudy	 72° / 55°F Light Rain	 68° / 50°F Sunny	 71° / 49°F Mostly Sunny	 71° / 49°F Mostly Sunny	 71° / 49°F Mostly Sunny	 69° / 47°F Mostly Sunny

BAKERSFIELD, CA 35.373, -119.019

Thu 10/8	Fri 10/9	Sat 10/10	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15
 76° / 52°F Mostly Sunny	 70° / 52°F Mostly Sunny	 73° / 55°F Mostly Sunny	 72° / 54°F Sunny	 67° / 52°F Partly Cloudy	 71° / 50°F Mostly Sunny	 68° / 48°F Sunny	 71° / 48°F Mostly Sunny

OXNARD, CA 34.197, -119.177

Thu 10/8	Fri 10/9	Sat 10/10	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15
 77° / 55°F Sunny	 75° / 54°F Mostly Sunny	 73° / 51°F Partly Cloudy	 76° / 54°F Partly Cloudy	 75° / 52°F Partly Cloudy	 71° / 51°F Cloudy	 71° / 54°F Mostly Sunny	 70° / 52°F Partly Cloudy

SANTA MARIA, CA 34.953, -120.436

Thu 10/8	Fri 10/9	Sat 10/10	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15
 73° / 53°F Sunny	 77° / 53°F Sunny	 74° / 52°F Sunny	 73° / 56°F Partly Cloudy	 73° / 49°F Sunny	 69° / 52°F Sunny	 73° / 51°F Partly Cloudy	 70° / 50°F Partly Cloudy

JALISCO / NAYARIT 20.950, -104.300

Thu 10/8	Fri 10/9	Sat 10/10	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15
 82° / 61°F Mostly Sunny	 80° / 62°F Mostly Sunny	 88° / 63°F Mostly Sunny	 85° / 61°F Mostly Sunny	 81° / 63°F Light Rain	 81° / 59°F Mostly Sunny	 81° / 61°F Cloudy	 78° / 61°F Sunny

VIZCAINO, BAJA SUR 27.167, -113.383

Thu 10/8	Fri 10/9	Sat 10/10	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15
 82° / 59°F Sunny	 82° / 58°F Cloudy	 83° / 58°F Mostly Sunny	 79° / 58°F Partly Cloudy	 78° / 56°F Mostly Sunny	 78° / 59°F Sunny	 74° / 55°F Sunny	 75° / 58°F Sunny

TORREON, COAHUILA 25.543, -103.407

Thu 10/8	Fri 10/9	Sat 10/10	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15
 84° / 61°F Mostly Sunny	 82° / 59°F Light Rain	 81° / 61°F Light Rain	 78° / 60°F Mostly Sunny	 78° / 58°F Mostly Sunny	 78° / 61°F Sunny	 77° / 57°F Mostly Sunny	 80° / 57°F Partly Cloudy

EVENSVILLE, TN 35.626, -84.960

Thu 10/8	Fri 10/9	Sat 10/10	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15
 67° / 52°F Mostly Sunny	 73° / 51°F Mostly Sunny	 75° / 52°F Light Rain	 75° / 52°F Mostly Sunny	 70° / 53°F Partly Cloudy	 74° / 50°F Mostly Sunny	 70° / 50°F Mostly Sunny	 69° / 49°F Light Rain

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: Avocado supply conditions remain stable, with Mexico expected to maintain strong, consistent production throughout the fall. Increasing Mexican harvest volumes are supporting a smooth transition as the California and Peru seasons wind down. The industry has begun transitioning from the Loca crop to Aventajada, with abundant Loca supplies helping maintain availability during the changeover. Seasonal rainfall and favorable growing conditions have supported a larger size profile, with medium and large fruit offering the greatest availability. Promotional opportunities remain attractive, particularly on 40-count and 48-count fruit, while improving jumbo availability continues to carry a price premium. California production is nearing completion, with limited northern harvests expected through October and some large and jumbo fruit available for select West Coast promotions. Peruvian arrivals are also approaching their seasonal conclusion, with final shipments expected within two weeks and remaining volumes concentrated in large and jumbo sizes. Steady demand and continued Mexican production are expected to maintain balanced market conditions and support promotional programs throughout October and November.

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, 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 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: ESCALATED Strawberry supplies remain tight as elevated temperatures across California and Baja, Mexico increase bruising, softness, and premature breakdown, reducing shelf life. Santa Maria volumes have declined approximately 25% to 35% as growers discard fruit with quality issues and fields experience a slow recovery in flower development. Watsonville and Salinas production continues to decline seasonally, with additional fruit diverted to processing. Overall quality is good to fair, with smaller, misshapen, and pale fruit also reported. Mexico shipments into Texas are expected to begin the week of October 12, but limited availability and upward pricing pressure are expected to persist through the remainder of the California season, approximately through December. Quality challenges are anticipated over the next six to eight weeks as supply transitions to Mexico and Florida.

Blackberries: WATCHLIST Blackberry volumes are increasing in Mexico, with direct exports to Texas underway, although organic availability remains light. Watsonville production is expected to remain steady over the next few weeks, but overall availability is limited, and organic volumes are expected to decline. Quality is generally good across both regions, with some softness and leaking fruit reported. Increasing Mexican production should provide additional supply as California winds down, although organic availability is expected to remain constrained.

Raspberries: WATCHLIST Raspberry volumes are increasing in Mexico, with direct exports to Texas underway. Watsonville production is expected to remain steady over the next two weeks, providing continued domestic supply during the seasonal transition. Quality is generally good, although some softness and leaking fruit are being reported in both conventional and organic shipments from Mexico. Increasing Mexican production should support availability as the category transitions toward fall and winter growing regions.

Blueberries: Pacific Northwest Blueberry production has concluded, shifting the primary supply source to Peru. Volumes are slightly below expectations and are forecast to remain steady but limited through October, consistent with typical seasonal availability. Peruvian fruit quality is excellent across conventional and organic offerings. Organic arrivals are particularly light, with a gap expected during the weeks of October 12 and October 19 before limited weekly arrivals resume in late October. Overall supplies are expected to improve in December as Mexico and Chile contribute additional volume.

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: EXTREME 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 now at the extreme level. Growers are holding to strict averages when they can but prorates should be expected.

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 when they can but prorates should be expected.

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

Green Leaf, Better Burger and Red Leaf: EXTREME 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: Supply is tightening up this week as coastal California regions begin to wind down for the season, and we prepare for Transition to the desert. The Hothouse Pepper category has also turned the corner and firmed up. Next week will be the tightest.

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: 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, and Tennessee 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: Honeydews are quickly becoming an area of concern with late fields in California being hit harder by virus and harvest projections are off by 25-30%. Sizing is still mostly 5s with no jumbo fruit being packed. Smaller sizing is available if we are in second cuts but that is extremely limited. Flexibility of sizing may be required over the next 7-10 days. Mexican crossings through Nogales have started but remain mostly limited due to rains experienced over the past week in growing regions.

Watermelon: The market is starting to transition the late-season US crop from Texas 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. Supplies on the smaller sizes are tight, so larger sizes may need to be subbed in order to get covered.

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 remains 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: ESCALATED Quality is good, but supplies are tightening up.

Parsley (Italian & Curly): Quality is good, but supplies are tightening up. Italian Parsley 60ct is escalated.

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

Spring Mix: 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 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 with Florida still 3 weeks out.
- **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: EXTREME** Very light volume this week on Cherries, Grapes and Medley due to weather-related pressure, summer crops ending early along the eastern seaboard and South Georgia starting late. We may actually see some supply interruptions in the east specifically on the entire category. Quality is fair at best. We expect volatility for the next two to three weeks.

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: EXTREME** A combination of events between the east coast and west coast being shorter than expected, markets will be firm across the category out west with possibilities of supply interruptions. Quality on the product loading in the west is far better than the east on all varieties.

California

- Supply has been stable on Rounds; however, larger sizes seem to be limited and drawing a premium; Romas have been mostly 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 has been mostly consistent across California; we should start to see volume start to decline daily as the season is expected to wrap up in approximately three weeks.

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 has 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: Tommys, 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.