

Weekly Market Review

November 7, 2025

Overview

We are well underway out of South Georgia; Zucchini, Bell Pepper, Corn and Cucumber are all readily available while we continue to ramp up in Nogales. Tomato production is also transitioning, as we see South Georgia growers in steady production while Florida starts to gain momentum as well. We are watching a strong cold front come across the south that could bring freezing temps to South Georgia and North Florida. We are keeping a close eye on this as it develops; this could potentially end the Georgia season prematurely. Grape season starting to wind down out of California and slowly transition offshore. Melon supply out of Firebaugh is mostly done with production is moving to Yuma, however, rain and low yields have supplies tight.

Pineapple availability remains limited; shippers are asking that we continue to be flexible on Pineapple sizes in particular.

Last week's US Avocado volume saw a modest step down and closed at 57.4 million pounds. The protest and road blockage has not done much to slow down the flow of Mexican fruit in the US, 54.7 million pounds crossed last week. Jalisco accounted for 6.8% with dry matter from both the Main Crop and Off Bloom Crop is over 28%. Mexican supply remains stable with availability on all sizes. Lenticel is still present but is typical for this time of the year due to rain. California is finishing up quickly and should be done in the next few weeks. Colombia and Chile are sending most of their volume to Europe but if the market shift could start sending more to the US.

In the East, vessel delays are disrupting the movement of Guatemalan products, while ongoing weather challenges in Guatemala are further pressuring production and quality. As a result, availability remains affected for Snow Peas, Sugar Snap Peas, Baby Peeled Carrots, Colored Baby Peeled Carrots, and French Beans.

Potential weather impacts are expected across California's berry-growing regions next week, with forecasts calling for rain mid-to-late week in both Oxnard and Santa Maria. While current conditions remain dry and harvests are on schedule, multiple days of rain could lead to reduced or delayed harvests and adjustments to loading schedules. To minimize disruption, growers plan to supplement with fruit from Central Mexico, so temporary shifts in pack styles, labels, or loading locations may occur.

The end of the Salinas season is approaching and there are still many issues with yields and quality. Growers are still seeing increased soil borne diseases and a large presence of insect pressure. The insect pressure and INSV along with the sporadic weather that Salinas received, are all contributing factors to the decreased yields. The limited supplies are driving the market, and some commodities are still escalating. Sugar Snap Peas, Snow Peas, Boston/Butter, Red Leaf, Green Leaf, Broccolini, Cauliflower, Lettuce, Romaine and Romaine Hearts markets are all extremely limited and the markets remain at the extreme level. You will see shortages on these items, and they will be very severe at times. We are seeing pin rot, brown bead, light weights, larvae, mildew and decay. Growers are holding to averages when they can but with the loss of acreage, holding to averages has become difficult and the growers are just getting out what they can. The Diamond back moth is still very active and is expected to affect supplies throughout the Salinas season. Brussels Sprouts quality is okay, but supplies are still

extremely tight. Growers are still holding to very strict averages when they can, but we have seen some prorates. The market is still at the extreme level and that is being driven by low yields. We can expect the light supplies to continue through November with the holiday pulls coming into play. Fennel/Anise are still escalated. Supplies are still a bit light. Artichokes also remain escalated. Sizing is small and growers are holding to strict averages. Broccoli, Bok Choy, Celery, Spring Mix, Arugula and Cabbage all remain escalated. Growers are seeing increased demand and decreased supplies. Celery continues to have light supplies. With the holidays and football season upon us, we expect to see that market stay firm. Cabbage supplies also remain very light. Growers are holding to averages when they can, but you will likely see shortages. As we get into the winter months and have the growers setting up for transition, we will continue to see significant quality and supply issues. Disruptions in supply should be expected. Yuma has also experienced rain and unusual weather patterns, so transition is expected to be bumpy. We will keep an eye on the weather and continue to send out updates and information as we receive it.

Our 2025-2026 Citrus program has officially begun! There is rain predicted for this next week in Dinuba, so citrus harvest may be stalled/paused due to this. Please keep in close contact with your supplier on their harvesting. Some suppliers are reporting Navels' size structure is peaking on medium sizes (72s/88s), followed by 56s and 113s, while others are seeing 88/113/138 peaks. Larger fruit is anticipated to be tighter in the coming weeks. Some field projections show small fruit tightening up after the new year. The quality and flavor profile of the fruit is still looking great overall. CA Pink Grapefruit is projected to finish up, with fancy grade requiring ample lead time while choice is readily available. Texas/Desert Rio Grapefruit has begun slowly and will continue to ramp up as we head into December. Supplies are beginning to improve on small Lemons (165 and up). Lemon Harvest has begun in Districts 1 and 3. Size structure is ideal from both districts 140s/115s/95s/165s or 140s/165s/115s/95s, respectively, allowing for availability across the board. Fruit is heavy to fancy, California Mandarins are anticipated to begin now with a slow start, and they are projected to continue to ramp up, with California Cara Caras and Bloods ramping up in December. The California Garlic crop reports that supplies are good.

Alert List









- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Arugula – **ESCALATED**
- Blackberries – **ESCALATED**
- Bok Choy – **ESCALATED**
- Boston/Butter Lettuce – **EXTREME**
- Broccoli Florets/Crowns/Asian Cut – **ESCALATED**
- Broccolini – **EXTREME**
- Brussels Sprouts – **EXTREME**
- Brussel Sprouts VA – **ESCALATED**
- Cabbage, Green/Shredded – **ESCALATED**
- Cauliflower – **EXTREME**
- Celery/Celery Sleeved – **ESCALATED**
- Cilantro – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Green Leaf – **EXTREME**
- Hot Pepper: Anaheim, Tomatillo, Serrano, Caribe and Red Fresno – **ESCALATED**
- Kale – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce Iceberg – **EXTREME**
- Lettuce VA Blends/Better Burger – **EXTREME**
- Napa – **ESCALATED**
- Red Leaf – **EXTREME**
- Romaine/VA Blends – **EXTREME**
- Romaine Hearts – **EXTREME**
- Snow Peas & Sugar Snap Peas – **EXTREME**
- Spring Mix – **ESCALATED**
- Strawberries – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List









1. Blueberries
2. Cabbage, Red
3. French Beans
4. Green Onions
5. Herbs
6. Pineapple
7. Ginger
8. Spinach
9. **Southeastern Veg**
10. Melons - Cantaloupe and Honeydew

Weather









SALINAS, CA

Thu 11/6	Fri 11/7	Sat 11/8	Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13
67° 50°F	71° 52°F	77° 54°F	73° 53°F	71° 53°F	68° 52°F	63° 52°F	62° 48°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy	Showers	Showers









OXNARD, CA

Thu 11/6	Fri 11/7	Sat 11/8	Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13
68° 55°F	73° 56°F	72° 56°F	70° 56°F	71° 56°F	67° 56°F	66° 57°F	64° 54°F
							
Partly Cloudy	Sunny	Sunny	Mostly Sunny	AM Fog/PM	AM Clouds/PM	Showers	Showers









COACHELLA, CA

Thu 11/6	Fri 11/7	Sat 11/8	Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13
88° 58°F	90° 58°F	92° 60°F	93° 61°F	94° 61°F	89° 57°F	85° 56°F	81° 54°F
							
Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy









HERMOSILLO, SONORA

Thu 11/6	Fri 11/7	Sat 11/8	Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13
98° 61°F	94° 60°F	94° 62°F	97° 66°F	99° 65°F	96° 64°F	94° 65°F	93° 65°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy









JALISCO, NAYARIT

Thu 11/6	Fri 11/7	Sat 11/8	Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13
86° 57°F	82° 58°F	82° 58°F	84° 62°F	86° 62°F	85° 61°F	85° 60°F	85° 60°F
							
Mostly Sunny	Mostly Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny









VIZCAINO, BAJA

Thu 11/6	Fri 11/7	Sat 11/8	Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13
94° 66°F	92° 67°F	91° 65°F	93° 66°F	96° 66°F	95° 66°F	96° 66°F	95° 66°F
							
Mostly Sunny	Mostly Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Mostly Sunny	Partly Cloudy

QUINCY, FL

Thu 11/6	Fri 11/7	Sat 11/8	Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13
82° 52°F	83° 64°F	83° 65°F	83° 43°F	57° 30°F	60° 34°F	71° 42°F	75° 44°F
							
Partly Cloudy	Mostly Sunny	Scattered Thunderstorms	AM Showers	Sunny	Sunny	Sunny	Sunny

LAKE PARK, GA

Thu 11/6	Fri 11/7	Sat 11/8	Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13
80° 50°F	82° 59°F	82° 65°F	82° 42°F	57° 29°F	58° 30°F	69° 39°F	74° 41°F
							
Partly Cloudy	Mostly Sunny	Isolated Thunderstorms	Isolated Thunderstorms	Sunny	Sunny	Sunny	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. However, a 10% tariff as well as an additional 5% reciprocal tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.*

Avocados: A 59.9-million-pound harvest was reported for week 44, with 54.7 million pounds shipped to the U.S. Jalisco currently accounts for 6.8% of Mexico's shipments to the U.S. Both the Main Crop (28% dry matter) and the Off-Bloom Crop (28.3% dry matter) are showcasing consistent sizing, peaking on 48s and 60s. Due to the rain during this time of the season, there is an increased presence of Lenticel. Lenticel are small brown spots that develop on the skin after harvest, especially during the rainy season. Lenticel has no effect on internal quality. The Main Crop continues to ramp up, now representing about 70.2% of total harvest volume. APEAM continues to enforce its dry matter standard, now releasing fruit for harvest at a minimum average of 23%. Approximately 2.6M pounds were harvested in week 43 from California. Sizing continues to peak on 48s and 60s. The California season is nearly complete, with minimal harvest expected through November.

Bananas: Banana supply remains stable despite strong demand for school business rapidly ramping up. Overall, banana quality has been very good.

Pineapples: WATCHLIST Pineapples will remain very short over the next 14 months at best due to low production in Central America brought on by drought, poor production and loss of acreage. Our

contracts continue to maintain their integrity; however, we will need to remain flexible regarding sizes to ensure the stability of the supply chain. Overall, the quality and taste are good.

Table Grapes: Fall production is winding down out of California, and demand has been steadily driving pricing higher. Quality will be mixed through the remainder of the season, high shatter, waterberry and depleted shelf life expect as the fruit ages. Very limited supply available on greens while reds and blacks are still readily available. Autumn Kings, Autumn Crisp. Red Varieties - Autumn Royals, Scarlets, Globes. Blacks - Sweet Sapphire. We expect to be into storage fruit by the second week of November.

Berries

Strawberries: ESCALATED Potential weather-related impacts to California's berry-growing regions are expected to occur next week. Current forecasts indicate the possibility of rain mid-to-late next week across both the Oxnard and Santa Maria growing regions. Demand continues to exceed supply. Harvests are producing high-quality, full-color fruit with minimal quality issues reported. Production in Salinas and Watsonville is winding down for the season, while Central Mexico (CMEX) volumes are increasing with strong quality and are expected to continue ramping up through the end of the year. Although Southern California and CMEX are performing well, their production is insufficient to offset the seasonal volume declines from Salinas, Watsonville, and Santa Maria. November typically represents the tightest supply period and the highest pricing of the year. Overall relief is not expected for another 3-4 weeks.

Blackberries: ESCALATED Production remains active across Central Mexico (CMEX), Baja, and Watsonville, with CMEX and Baja volumes increasing steadily each week heading into the fall. Overall supplies have improved; however, quality remains inconsistent across regions, with some reports of color reversion. Isolated occurrences of soft or overripe fruit are also being noted due to recent heat, rain, and humidity in the growing areas.

Raspberries: Production continues across Central Mexico (CMEX), Baja, and Oxnard. Supplies have tightened following recent rainfall in the growing regions and as the Watsonville season ends and Oxnard volumes decline. Overall quality remains good, though some soft or overripe fruit is being observed due to recent heat, rain, and humidity.

Blueberries: WATCHLIST Production remains active in Central Mexico (CMEX), with steady supplies supported by increased arrivals from Peru helping to balance overall industry availability. Mexican quality and sizing continue to be very good, contributing positively to market stability.

Citrus

Lemons: WATCHLIST ON SMALL SIZES (165's and below) Small lemons are continuing to be a tight commodity. With most crops producing a larger size structure, they continue to be challenging.

Limes: Supply is steady for all sizes; quality will be mixed over the next few weeks.

Imports/Specialties: Blood Oranges will be finishing for the season in the next few weeks. Sizing is running small. Grapefruit is available with light supplies on Fancy grade; choice grade is available. Cara's, Minneolas and Mandarins are all but finished for the season.

West Coast Lettuce

Iceberg: EXTREME Lettuce quality is fair, but supplies are extremely tight. Growers are prorating. At times the prorates are extreme. We are still seeing signs of INSV, lighter weights and ribby lettuce. With more rain in the forecast, we expect some production gaps over the next few weeks. The market is still very active. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Iceberg VA: EXTREME Quality is fair, and supplies are tight. Growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Romaine & Romaine Hearts: EXTREME Romaine and Romaine Heart quality are fair, but supplies are extremely tight. The market is still trending higher due to increased demand. There have been reports of bruising, mechanical damage, lightweights, fringe burns and light cupping. Insect pressure and sclero/INSV have also been reported. For the hearts, we are seeing very little heart material. Growers are prorating. The prorates can be extreme. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Romaine VA: EXTREME Quality is okay, and supplies are extremely limited. Growers are prorating. The prorates can be extreme. should be expected. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Boston/Butter Lettuce: EXTREME Quality is okay but supplies extremely are tight. We have seen mildew and fringe burn pressure. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Green Leaf, Better Burger and Red Leaf: EXTREME Quality is fair, and supplies are extremely tight. Prorates should be expected. We have seen mildew and fringe burn pressure. We are also seeing lighter carton weights. The weather has affected harvesting and quality. This is causing additional supply issues.

Eastern and Western Vegetables: WATCHLIST (East Coast): We are expecting a strong cold front to impact the southeast early next week with freezing overnight temp Tuesday and Wednesday. This event could impact vegetable out of South Georgia and parts of Florida. We will assess this forecast and keep you informed of any concerns.

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Green Bell Pepper: Steady supply available from all growing regions. Quality is good.

Color Bell Pepper: Steady supply available from all growing regions. Quality is good.

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

Mixed Chili Pepper: ESCALATED Supplies were lighter this week as this week's rain has caused harvest delays and ongoing quality issues on several varieties. Sinaloa will slowly break this week and should relieve some of the upward market pressure coming from California and Baja. We are still seeing firm markets on Anaheim, Tomatillo, Serrano, Caribe and Red Fresno were the tightest this week. With respect to Red Fresno, we recommend a sub to red jalapeno when needed.

Eggplant: Domestic supply is steady out of Fresno and South Georgia. Quality is good. Mexico crossings will ramp up this week.

Slicer Cucumbers: Supply crossing through Otay, Nogales and McAllen may be lighter this week due to harvest delays caused by this week's weather in Baja and Sonora. Domestic supply was also stable out of South Georgia. Quality is good out of all growing regions this week.

English Cucumbers: Light supply available this week. Quality is good.

Pickles: Light supply expected out of South Georgia. Mexico should start ramping up over the coming weeks. Quality remains strong domestically and the fields in Mexico show good development to date.

Green Beans: Supply and quality were mixed this week, and demand was light as most growing regions deal with weather-related pressure.

French Beans: WATCHLIST Production out of Guatemala remains good, with quality continuing to improve. Supplies of French beans from Mexico are fair.

Zucchini/Yellow Squash: Supply will be mixed this week; plentiful in the west while the Southeast struggles through transition. We are seeing a split in the markets as well as fob pricing in the east hitting the mid-teens and single digits in the west. We could see further variances between the two markets should the cold front impact production out of the east.

Herbs: WATCHLIST Basil production remains strong from Colombia and Mexico, though some quality issues have been reported due to heat in the fields. Imported chervil supplies continue to be limited as weather in Ecuador impacts production. Overall, herb availability is steady with good quality, except for sage, which remains tight due to weather-related challenges. Quality across some items may continue to vary depending on field conditions.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Marginal	USA
Basil	Very Limited	Marginal	USA/MEX
Opal Basil	Very Limited	Marginal	USA
Thai Basil	Very Limited	Marginal	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA

Chives	Steady	Steady	MEX
Cilantro	Limited	Marginal	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons WATCHLIST

Overview: Product remains tight out of Yuma on cantaloupes and honeydews and sizing still favors bigger fruit. The Yuma season only has about 10-14 days left. Overall quality has been good with some dirt remaining on the melons and scarring on the dewes. Imported melons are expected next week and will relieve some of the pressure off Arizona. However, the early sizing profile is leaning towards the bigger end.

Cantaloupe: Harvesting on cantaloupes in Guatemala has started and some shippers are expecting their start arrival sometime next week. Sizing is still heavy on the 9s, but some 12s are getting packed. Quality looks good with firm fruit and brix ranging from 11-14%. Some suppliers will start moving customers to load offshore fruit in different ports as the product becomes available.

Honeydew: Honeydew can be sourced from both domestic suppliers, and importers from Mexico. Sizing from regions are leaning heavy on the 5 and 6ct. Mexican product through Nogales have increased, relieving some of the pressure in the market. Scarring is a common characteristic at this time of the year, and mud/dirt will also be seen.

Watermelon: Domestic watermelons can be found on both coasts; however, there is an upward trend in prices due to a decrease in supply. The supply of Mexican watermelons via Texas and Nogales has been constrained due to production challenges stemming from rainfall experienced last month.

Mixed Vegetables

Artichokes: ESCALATED Quality is good, but supplies are limited. Growers are holding to averages, and there may be some substitutions on sizes. Large sizes are extremely tight.

Asparagus: ESCALATED Mexican production on smaller sizing continues to improve this week out of Hermosillo, though larger sizes remain limited. Peruvian volume and sizing are also showing steady improvement. With increased availability of standard-sized product from Mexico, markets have become less active and are showing signs of stabilization.

Bok Choy: ESCALATED Quality is good, but supplies are still limited. The light supplies are driving the market.

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is okay, and supplies are still limited. Growers are starting to move to Yuma so things should improve in a few weeks. We have still had reports of Browning, Pin Rot and Larvae from the insects. Most growers are still prorating. MX Broccoli has gotten better, and they are seeing good yields. The Salinas weather and the fact that growers are harvesting the last of the Salinas fields is affecting yields and quality. Organic Broccoli is still at the Extreme Trigger.

Broccolini and Sweet Baby Broccoli: EXTREME Quality is fair, and supplies are extremely tight on this item. Growers are prorating. Some growers are only covering 50% of 10-week averages. Pricing is at the extreme level. The weather has affected harvesting and quality. This is causing additional supply issues.

Brussels Sprouts: EXTREME Supplies are extremely limited. We still have some growers struggling with yields and growers who pulled early from their fields to cover orders over the past few weeks are now having to wait for the new crops to catch up to demand. Insect pressure and internal browning continue to be reported but the quality looks okay. The market is still at the extreme trigger. Growers are holding to averages when they can, but we have seen prorates.

Carrots (JUMBOS, MEDIUMS and CELLOS): Growers are still harvesting in Monterey County and Kern County district. Supplies are steady and the size on jumbos is good right now. Quality is good and should get even better as growers move forward into Lancaster and Cuyama. They will harvest there through November. When we look at the MX carrots, MX carrot volumes are decreasing due to natural seasonality as well as local markets emerging from Canada this time of year. Production remains the strongest in Guanajuato and Puebla and will start to lean more to Puebla as the year progresses.

Cauliflower: EXTREME Quality is fair, and supplies are extremely tight. Growers are battling insect pressure, and they are holding to averages. Some growers have started to prorate, and the market is still at the extreme level. The weather has affected harvesting and quality. This is causing additional supply issues.

Celery: ESCALATED Quality is good, but supplies are extremely tight. As we head into the Fall pull, the market prices are trending upward. Demand has risen due to schools starting back up and with football season in full swing. Organic Celery is at the extreme trigger.

Corn, Sweet: Lighter supply in the west and strong out of South Georgia. We are in all new crop and quality is good.

Fennel: ESCALATED The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve. Some growers are holding to 8-week averages, but we have seen some prorates.

Kale: ESCALATED Supplies are limited, and quality is okay.

Leeks: ESCALATED Quality and supplies look okay.

Garlic: The 2024-2025 California Garlic season is ending, and the California Garlic crop has begun, so you should expect to see some improvement in supply as they move into this harvest. Quality remains good although availability will be held to current commitments until the growers have had enough time to evaluate this crop.

Ginger: Supplies and market are steady.

Green Cabbage: ESCALATED Supplies are extremely tight, and quality is okay. We are seeing poor yields in the VA cabbage as growers are trying to limit the core in the finished product. Growers are starting to hold to averages. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

Green Onions: WATCHLIST Supplies are very inconsistent. Quality looks okay.

Mushrooms: Lighter volume available as the summer production winds down; overall forecasts are below expectations and demand is higher. We are quickly approaching that time of year when holiday pull at retail makes supply very short. Quality is good.

Napa Cabbage: Quality and supplies are improving but there is some insect pressure.

Parsley (Italian & Curly): Supplies and quality look good.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

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

Spinach: WATCHLIST Supplies are limited with some growers and quality is okay. We have seen some reports of weak texture, discoloration, wilting, moderate wind damage and there has been some insect damage. We have also recently seen heavy mechanical damage due to brittle texture. The weather has heavily affected harvesting and quality. This is causing additional supply issues.

Spring Mix: ESCALATED Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. The hail has really affected quality, and you will see the damage in some packs. The weather has affected harvesting and quality. This is causing additional supply issues. The market is now escalated.

Snow Peas and Sugar Snaps: EXTREME Supplies of Guatemalan snow peas and sugar snaps remain extremely limited as adverse weather continues to impact production, with little improvement expected until mid-November. Peruvian volumes are low due to normal seasonal declines, and domestic supplies also remain limited. Pricing continues to be elevated as demand far exceeds available supply. Mexican production has recently begun, but volumes remain insufficient to meet market needs.

Onions:

The onion market is expected to remain stable throughout Q4. With harvest concluding, all product will ship exclusively from storage in the Pacific Northwest. While we may see a modest increase occur, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

Potatoes:

Potato supply in for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. Burbanks will begin to ship in limited volume in mid-October, though Norkotahs will continue to make up the majority of the supply. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

Tomatoes:

Tomato Suspension Agreement Update

As we continue to navigate the impacts of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties will be imposed on Mexican tomatoes. We are actively working with each grower partner to gather a breakdown of how duties will be applied for tomatoes imported from Mexico and will provide updates once we have completed the implementation process.

East Coast –WATCHLIST

- **Round Tomatoes:** Supply ramping up out of Ruskin and Palmetto; South Georgia production is also stable. Quality is good.
- **Roma Tomatoes:** Supply is ramping up. Overall quality is mixed and should improve as volume increases out of Florida.
- **Snacking Tomatoes (Cherry, Grape and Medley):** AMPLE supply available out of the summer programs, we will start transitioning to South Georgia and Florida over the next week. Quality is outstanding!

Mexico

- **Round Tomatoes:** Volume is steady crossing through McAllen and Otay. Quality is good.
- **Roma Tomatoes: Volume** is improving through McAllen and Otay. Quality is good.
- **Snacking Tomatoes:**

- **Grape Tomatoes:** Excellent supply and weak demand have put downward pressure on price. Quality is good.
- **Cherry Tomatoes:** Most of the volume seems to be crossing from the Baja; quality is very good. Demand is flat.
- **Medley Mixed Tomatoes:** Good supply crossing through McAllen and Otay. Quality is mostly good.
- **Tomato on the Vine:** Stable volume available this week.

California – Mostly done for the season due to weather.

Other Fruit:

Apples: **Red Delicious** apples have good availability across all sizes and grades, with a steady market expected to carry through until the new crop begins around the second week of September. **Golden Delicious** supplies remain available in most sizes and grades, though some growers are nearing the end of their season. Availability should continue for another month or two, though tightening supply may lead to firmer pricing. **Gala** apples show strong availability across all sizes and grades, with the market holding steady and supply projected to last until new crop harvest in mid-August. **Fuji** remains well supplied in larger sizes and higher grades, with steady markets expected through September. **Pink Lady** apples are solid in both supply and quality, though a brief gap may occur prior to the new crop harvest in October. **Honeycrisp** is experiencing tight supply across all sizes and grades; most USXF/WAXF #2 fruit has finished for the season. The market continues to strengthen, and a short gap is anticipated before new crop availability resumes in August. **Granny Smith** apples are in good supply across all sizes and grades, with steady markets expected to continue until the early September harvest. On the organic side, Gala, Fuji, Pink Lady, and Granny Smith apples are available in very limited volumes across most sizes and grades, while Honeycrisp is mostly finished until the new crop returns in August.

Pears: **D’Anjou** availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. **Red D’Anjou** pears are moderately available in US #1 35–55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Steady supply available out of California.

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

Cherries: Done for the season.

Stone Fruit: Done for the season.

Kiwi Fruit: Supplies fair out of California as well as offshore landing on the East Coast.

Quince: Limited supply available this week.