

## **Weekly Market Review**

**November 28, 2025**

### **Overview**

The tightest items going into the Thanksgiving Holiday are Green Beans and Roma Tomatoes. There is good supply available on Corn, Cucumber and Green Bell Pepper. In the West, product continues to improve on all commodities crossing through Nogales; Tomatoes will start crossing in approximately four weeks; Romas will be first, followed by Rounds then Snacking Tomatoes while Bell Pepper will start in approximately three weeks in Nogales. Tomato production is now in full swing out of Ruskin and should start to ramp up in Immokalee. Grape season is starting to wind down out of California and slowly transitioning offshore.

Import Cantaloupes from Guatemala has begun. Initial quality and brix levels are good, although sizing is heavier on the 9/12ct. Pineapple availability remains limited; shippers are asking that we continue to be flexible on Pineapple sizes. Avocado supply remains stable with good demand driven by retail promotion and lower than average pricing. Overall, volume is stable with good quality. Lenticel is still present and is typical for this time of the year due to rain. Chile and Colombia seasons are underway with limited volume landing in the US.

In the East, Guatemalan weather conditions have improved, although shipping arrival schedules have once again become unpredictable due to continued weather issues in the Caribbean Sea and port congestion. We will continue to see vessel delays.

California berry growing regions received significant rainfall over the past two weeks, including a major event two weeks ago and another last week. Growers salvaged what they could, although packed fruit was wet and quality concerns such as undercolor, underripe fruit, shoulder and tip damage, and reduced shelf life were expected. Crews will continue to clean up as they make rounds in each field but do expect to pack more fresh packs each day we harvest. To support West Coast programs, growers shifted limited volumes from Central Mexico (CMEX) into California for consolidation. Growers are expected to return to somewhat normal production levels in the second or third week of December.

Recent rain in Yuma has created significant challenges for harvesting. Expect extremely tight supplies on most baby leaf and leafy green items (this includes parsley, cilantro and arugula). Growers were unable to harvest on Friday, Saturday, or Sunday last week, and they are now working to catch up as they regain access to the fields. Harvesting remains difficult, as conditions are still quite wet and the fields have not fully dried out. Baby leaf items are probably in the toughest spot to rebound from the rains. We expect these items to remain extremely tight this week. Light supplies and loading delays should be expected. Weather will most likely continue to be the biggest factor as we settle into Yuma. Brussels Sprouts, Sugar Snap Peas, Snow Peas, Boston/Butter, Red Leaf, Green Leaf, Broccolini, Cauliflower, Lettuce, Romaine and Romaine Hearts markets all remain at the extreme level. You will likely still see shortages on some of these items. Brussels Sprouts and Celery supplies remain extremely tight. Growers are holding to very strict averages when they can, but you will see prorates as we approach the holiday season. Both commodities are likely to continue to escalate. The market is at the extreme level and that is driven by low yields. We can expect the light supplies to continue through November with the holiday pulls coming into play. Brussels Sprout prorates will be at 50% through the end of the year. A Market Alert was sent out. Artichokes also remain escalated. Sizing is still small, and growers are holding strict averages. Anise/Fennel, Broccoli, Bok Choy, Spring Mix, Arugula and Cabbage all remain escalated. Growers are

seeing increased demand and decreased supplies. Growers are holding to averages when they can, but you will still see shortages with the rain being the continued contributing factor. Growers are doing as much as they can to get out the best products that they can, but we will continue to see significant quality and supply issues. Mother Nature is in control and quality issues and disruptions in the supply chain should be expected. We will keep an eye on the weather and continue to send out updates and information as we receive it.

There is no rain predicted in the coming week, so things should be opening back up in the central valley. The Navel crop is peaking in an 88/113 size structure. Some larger sizes are becoming more readily available. Color and taste profiles are excellent. Brixing on average of 12-13. Current field projections show small fruit will tighten up after the New Year. D3 is the main growing region for lemons currently and is peaking a 140/115/165 with a 70/30 fancy to choice ratio. D1 lemons will be tight this week as suppliers work to move crews to the orange crop. Please provide lead time if you're looking to load in the valley. Grapefruit Red Rios are the main variety being packed. Crop is peaking in a 40/48 size structure. Mandarins are ramping up this week. Please provide additional lead time on orders. Crop is peaking on 32/28. Caras and bloods are anticipated to begin early December! Expect Minneolas in January. The California Garlic crop reports that supplies are steady but will continue to tighten as the year goes on. Maintain your averages to ensure product as the season continues.

#### **Alert List**

- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Blackberries – **ESCALATED**
- Bok Choy – **ESCALATED**
- Boston/Butter Lettuce – **EXTREME**
- Broccoli Florets/Crowns/Asian Cut – **ESCALATED**
- Broccolini – **EXTREME**
- Brussels Sprouts – **EXTREME**
- Brussels Sprouts VA – **ESCALATED**
- Cauliflower – **EXTREME**
- Celery/Celery Sleeved – **EXTREME**
- Fennel, Anise – **ESCALATED**
- Green Beans – **ESCALATED**
- Green Leaf – **EXTREME**
- Hot Pepper: Anaheim, Tomatillo, Serrano, Caribe, Jalapeno, Habanero and Red Fresno – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce Iceberg – **EXTREME**
- Lettuce VA Blends/Better Burger – **EXTREME**
- Napa – **ESCALATED**
- Green Onions – **ESCALATED**
- Red Leaf – **EXTREME**
- Romaine/VA Blends – **EXTREME**
- Romaine Hearts – **EXTREME**
- Snow Peas & Sugar Snap Peas – **EXTREME**
- Strawberries – **EXTREME**
- Tomatoes- Romas and Snacking Tomatoes - **ESCALATED**
- White Asparagus – **ESCALATED**

#### **Watch List**









1. Blueberries
2. Cabbage, Red
3. French Beans
4. Herbs

5. Pineapple
6. Ginger
7. Spinach









8. Melons - Cantaloupe and Honeydew
9. Mushrooms

## Weather









### SALINAS, CA

Thu 11/27	Fri 11/28	Sat 11/29	Sun 11/30	Mon 12/1	Tue 12/2	Wed 12/3	Thu 12/4
68°   45°F	62°   45°F	60°   44°F	62°   44°F	64°   45°F	64°   45°F	59°   44°F	60°   46°F
							
Cloudy 0 in	Partly Cloudy 0 in	Mostly Cloudy 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Mostly Sunny 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in









### YUMA, AZ

Thu 11/27	Fri 11/28	Sat 11/29	Sun 11/30	Mon 12/1	Tue 12/2	Wed 12/3	Thu 12/4
77°   51°F	77°   51°F	74°   52°F	70°   52°F	70°   48°F	68°   48°F	67°   53°F	65°   52°F
							
Mostly Cloudy 0 in	Sunny 0 in	Sunny 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Mostly Sunny 0 in	Partly Cloudy 0 in	AM Showers 0.12 in









### OXNARD, CA

Thu 11/27	Fri 11/28	Sat 11/29	Sun 11/30	Mon 12/1	Tue 12/2	Wed 12/3	Thu 12/4
73°   52°F	66°   51°F	63°   53°F	63°   51°F	65°   51°F	63°   50°F	59°   49°F	59°   50°F
							
Cloudy 0 in	Mostly Sunny 0 in	Mostly Cloudy 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Partly Cloudy 0.06 in	PM Showers 0.37 in









### COACHELLA, CA

Thu 11/27	Fri 11/28	Sat 11/29	Sun 11/30	Mon 12/1	Tue 12/2	Wed 12/3	Thu 12/4
80°   54°F	80°   55°F	76°   55°F	73°   53°F	73°   51°F	72°   49°F	68°   50°F	66°   51°F
							
Mostly Cloudy 0 in	Sunny 0 in	Mostly Sunny 0 in	Partly Cloudy 0 in	Mostly Sunny 0 in	Mostly Sunny 0 in	Partly Cloudy 0.08 in	Partly Cloudy 0.13 in









### HERMOSILLO, SONORA

Thu 11/27	Fri 11/28	Sat 11/29	Sun 11/30	Mon 12/1	Tue 12/2	Wed 12/3	Thu 12/4
88°   55°F	85°   53°F	84°   55°F	82°   55°F	78°   53°F	78°   53°F	78°   58°F	76°   56°F
							
Cloudy 0 in	Sunny 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Mostly Sunny 0 in	Partly Cloudy 0.07 in	Partly Cloudy 0 in









## JALISCO, NAYARIT

Thu 11/27	Fri 11/28	Sat 11/29	Sun 11/30	Mon 12/1	Tue 12/2	Wed 12/3	Thu 12/4
84°   60°F	84°   58°F	82°   57°F	80°   58°F	79°   57°F	78°   57°F	79°   57°F	81°   56°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	AM Clouds/PM Sun	Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy
0 in	0 in	0 in	0 in	0 in	0 in	0 in	0 in

## VIZCAINO, BAJA

Thu 11/27	Fri 11/28	Sat 11/29	Sun 11/30	Mon 12/1	Tue 12/2	Wed 12/3	Thu 12/4
94°   63°F	94°   62°F	92°   65°F	88°   67°F	86°   63°F	86°   62°F	86°   63°F	88°   63°F
							
Mostly Cloudy	Partly Cloudy	Mostly Cloudy	Cloudy	Mostly Cloudy	Mostly Cloudy	Mostly Cloudy	Partly Cloudy
0 in	0 in	0 in	0 in	0.08 in	0 in	0 in	0 in

## RUSKIN, FL

Thu 11/27	Fri 11/28	Sat 11/29	Sun 11/30	Mon 12/1	Tue 12/2	Wed 12/3	Thu 12/4
72°   47°F	67°   48°F	79°   60°F	83°   65°F	82°   65°F	80°   58°F	74°   58°F	77°   60°F
							
Mostly Cloudy	Sunny	Mostly Sunny	PM Showers	Partly Cloudy	Showers	Partly Cloudy	Partly Cloudy
0 in	0 in	0 in	0.08 in	0.01 in	0.1 in	0 in	0 in

## 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, tariffs will be removed over the next two weeks, based on their arrivals time in the United States on items such as Bananas, Coffee and Pineapple to name a few key items. Tariffs will remain in place on certain items and countries such as Columbia until trade new agreements are reached.

**Avocados:** Good volume from Mexico is keeping the US demand satisfied. Strong retail pull and ample supply is keeping pricing low. Sizing is still peaking on 48s and 60s and dry matter in the high 20s. 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.

**Bananas:** Banana supply remains stable and demand strong as we approach the holiday season. Overall, the banana quality was very good. We will see the removal of tariffs on these items over the next two weeks as we deplete inventory on hand and begin receiving product at the ports that will no longer have tariffs imposed on them. We will provide updates very soon on these rollout timelines.

**Pineapples: WATCHLIST** The Pineapple market has started to settle down some but remains tight. Demand remains high, keeping pricing stable. 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 essentially done out of California due to recent weather events and we are now solely dependent on storage fruit. Demand has been stronger going into the Thanksgiving Holiday pull at retail and prices were higher this week. 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 is available on greens while reds and blacks are still readily available. Autumn Kings, Autumn Crisp, Autumn Royals, Scarlets, Globes. Limited availability on Thompsons, Sweeties and Sweet Globes.

### **Berries**

**Strawberries: EXTREME** California's growing regions received roughly 6.5 inches of rain over the past week. Production has been limited as crews focus on cleanup and field maintenance, though growers expect to harvest for at least 4 days next week and move toward a more typical schedule with reduced volume across all acres. Some cleanup will continue as they make rounds in each field, but they do anticipate packing more fresh product on each harvest day. Normal conditions, production levels, and harvest schedules are expected to resume the week of Monday, December 1. Central Mexico continues to show steady weekly production increases, though current growth is insufficient to offset the volume decline from California or to match current industry demand. Quality has been strong in the early season, with clean, consistent packs. Florida has started very lightly, and we do not anticipate regular daily harvests or meaningful volume until the second or third week of December.

**Blackberries: ESCALATED** Production is ongoing in Central Mexico (CMEX) and Baja, and overall availability remains strong. Quality continues to be good, although we are seeing some instances of soft fruit along with occasional red cell or color reversion tied to recent heat, rain, and elevated humidity in the growing regions. Conditions are being monitored closely to maintain consistency.

**Raspberries:** Production continues in Central Mexico (CMEX) and Baja, and overall availability is strong. Quality remains good, although there have been some instances of soft or overripe product due to recent heat, rain, and elevated humidity in the growing regions. Conditions are being monitored closely to maintain consistency and coverage.

**Blueberries: WATCHLIST** Production remains active in Central Mexico (CMEX), and overall availability is strong. Quality and sizing out of Mexico have been very good, with consistent packs and strong field conditions.

### **Citrus**

**Lemons:** Lemons are finally opening up on small sizes and there is good availability. With harvesting currently in both D3 and D1, there is availability across the board.

**Limes:** Supply evenly distributed across all sizes will continue, however quality will still remain mixed over the next few weeks. Markets were a bit higher this week due to higher demand and lighter overall supply.

**Specialties:** Blood oranges and Cara Cara's are anticipated to begin in mid-December. When bloods begin in December, please be aware that the typical "blush" exterior may not be present, though internally you will find it! By mid-January, you will begin to see more of the typical exterior "blush" color on bloods.

### **West Coast Lettuce**

**Iceberg: EXTREME** Lettuce quality is okay, but supplies are still tight. Weights remain light. Some growers are prorating. The rain has caused harvesting delays, and we expect some production gaps over the next few weeks. The market is still very active. The weather has affected both harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Iceberg VA: EXTREME** Quality is okay and supplies are okay. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Romaine & Romaine Hearts: EXTREME** Romaine and Romaine Heart quality are okay, and supplies are still tight. There have been reports of bruising, mechanical damage, lightweights, fringe burns and light cupping. For the hearts, we are seeing very little heart material. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we get into the holiday season.

**Romaine VA: EXTREME** Quality is okay, and supplies are still limited. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**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 be challenging as we go into the holiday season.

**Green Leaf, Better Burger and Red Leaf: EXTREME** Quality is fair, and supplies are extremely tight. 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. Yields will continue to be challenging as we go into the holiday season.

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**Green Bell Pepper:** Steady supply available from Coachella, Nogales, McAllen and South Florida. Quality is good.

**Color Bell Pepper: WATCHLIST** Steady supply out of Coachella and Crossing through Mexico on blocky varieties. We expect to see shortages in the east until Florida starts field grown reds. 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. Sonora and Baja continue to struggle with volume, and we expect Sinaloa will slowly break this week and should relieve some of the upward market pressure. California is done for the season. We will see escalated markets on Jalapeno, Habanero,

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 is steady this week and quality outstanding. Domestic supply will quickly transition to South Florida as Georgia lost most of its crop due to weather. Quality is good out of all growing regions this week.

**English Cucumbers:** Steady supply available this week crossing through Nogales and Canada. Quality is good.

**Pickles:** Supply ramping up out of Florida and Mexico. Quality is good.

**Green Beans: ESCALATED** High Demand for Thanksgiving and light supply have driven prices higher this week. The freeze that impacted the southeast last week has impacted overall volume and will be an issue through Thanksgiving. We do expect some improvement over the coming weeks as newer blocks come available. Supply is steady crossing through Nogales and McAllen. Overall, quality is good.

**French Beans: WATCHLIST** Guatemala continues to show good production, and quality is steadily improving week over week. Mexico is providing a fair supply, keeping overall availability in a stable position.

**Zucchini/Yellow Squash: WATCHLIST** Supply and markets will be mixed this week due to the cold weather in the east will most likely interrupt availability during the holiday pull as Georgia will wrap up for the season. Good news is we will still see steady crossing through Nogales and McAllen. With Georgia wrapping up the demand will quickly transition to South Florida for the winter.

**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	Limited	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	Limited	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	Limited	Limited	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:** Imports from Guatemala have started hitting Florida. There have been vessel delays limiting overall volume. The quality has been good with consistent high brix. Imported honeydew volume should increase over the next few weeks, but Mexican honeydews are available.

**Cantaloupe:** We are starting to see the sizing profile shift to the 9/12s on the import. Overall, the fruit is strong, with solid netting, good internal quality and brix levels ranging from 13-18%. Shippers are anticipating overall production to improve with the addition of more growing areas and a better size profile.

**Honeydew:** Honeydew can be sourced from both domestic suppliers, and importers from Mexico. Sizing is 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. Guatemalan honeydews have been slow to start due to cooler temperatures but should increase soon.



**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 continues to strengthen, while northern Peru maintains steady output from Trujillo. The southern Ica region has begun to taper off due to seasonal shifts, resulting in a stronger mix of smaller and standard sizing. Overall supply is becoming more balanced as volumes increase from both regions. With more standard sizing available, market activity has softened, and pricing has become less aggressive. In the coming weeks, we expect continued improvement in supply, which should lead to market stability.

**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, but supplies are still very limited. Growers have moved to Yuma, but the rain has limited yields. We have still had reports of Browning, Pin Rot and Larvae from the insects. Some growers are still prorating. Organic Broccoli is still at the Extreme Trigger. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**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. Yields will continue to be challenging as we go into the holiday season.

**Brussels Sprouts: EXTREME** Supplies are extremely limited. Growers are struggling with yields. Insect pressure and internal browning continue to be reported, and quality just looks okay. The market is still at the extreme trigger. Severe prorates should be expected. Growers are covering 50% of weekly averages. Mid December is when we will see MX sprouts come into play so you should expect quality and supply issues until we reach Jan 2026.

**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 in 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. Rainfall has affected harvesting for some growers. Cello and Jumbo Carrots are the most heavily affected, and there will be limited availability until weather conditions improve.

**Cauliflower: EXTREME** Quality is fair, and supplies are tight. The market is still at the extreme level. The weather continues to affect harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Celery: EXTREME** Quality is good, but supplies are extremely tight. The market prices continue to trend upward. Demand has risen due to the holidays and football season. The weather has affected harvesting and quality. This is causing additional supply issues Yields will continue to be challenging as we go into the holiday season.

**Corn, Sweet:** Lighter supply in the west while supply is steady out of Florida and 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:** Supplies are limited, and quality is okay. The weather has affected harvesting and quality. This is causing additional supply issues Yields will continue to be challenging as we go into the holiday season.

**Leeks: ESCALATED** 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 market are steady.

**Green Cabbage:** Supplies are still tight, but they are improving. Quality is good. Some growers are still holding to averages. The weather is still affecting harvesting and quality. This could cause supply issues. Yields will continue to be challenging as we go into the holiday season.

**Green Onions: ESCALATED** Supplies are very inconsistent. Quality looks okay. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Mushrooms: WATCHLIST** We are into our typical holiday pattern now with lower volume and extremely high demand for Thanksgiving. Supply expected to be light through the first of the year. Quality is good.

**Napa Cabbage:** Quality and supplies look good.

**Parsley (Italian & Curly):** Supplies and quality have both been affected by the recent rains. As with the baby leaf items, parsley was unable to be harvested, and growers will need to catch up on supplies. Prorates should be expected. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**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 still limited. We have still seen some reports of weak texture, discoloration and wilting. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Spring Mix: ESCALATED** Supplies on Spring Mix are limited this week. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Snow Peas and Sugar Snaps: EXTREME** Supply from Guatemala remains very limited due to recent weather challenges, and improvement is not expected for another two to three weeks. Production in Peru is nearing its seasonal end, which is contributing to tighter overall availability. Pricing continues to be elevated as demand far exceeds available supply. Mexican production has recently begun, but volumes remain insufficient to meet market needs. Yields continue to be challenging, and most growers are only covering 50% of averages.

#### **Onions:**

The onion market is expected to remain stable throughout Q4. With harvest conclude, all products 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 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**

- **Round Tomatoes:** Supply is plentiful on new crop rounds out of Ruskin and Palmetto, and seeing deals made across all sizes with lackluster demand going into the Thanksgiving Pull. Quality is outstanding.
- **Roma Tomatoes: ESCALATED** Light supply combined with higher demand for the holiday pull have put upward pressure on fob prices. We expect volume to increase over the next week. Overall quality is good out of Florida.

- **Snacking Tomatoes ESCALATED (Cherry, Grape and Medley):** Supply got tight this week due to the cold weather. We do not expect to see any improvement until after Thanksgiving. Quality will be mixed.

### **Mexico**

- **Round Tomatoes:** Volume is steady crossing through McAllen and Otay. Quality is good.
- **Roma Tomatoes: ESCALATED** Light supply this week crossing through McAllen and Baja due to cooler weather. This combined with higher demand for the holiday pull have put upward pressure on fob prices. The cold weather slowed production down and will most likely be late next week until we see volume increase. Overall quality is good
- **Snacking Tomatoes:**
  - **Grape Tomatoes: ESCALATED** Lighter supply and higher demand from the east have put upward 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.

### **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.