

## Weekly Market Review

**January 02, 2025**

### Overview

Production continues to be steady out of Florida and Mexico due to optimal growing conditions. Supply remains steady and quality is excellent; however, in Florida, we are monitoring a cold front moving through today that is expected to keep temperatures well below normal through New Year's. Tomatillos are extremely short due to recent weather-related pressure, with a severe decrease in fresh tomatillo crossings. In addition to reduced volumes, we are seeing specification variations, primarily smaller sizes. Over the next 7-10 days, we expect shortages and pro-rates on this item, along with no peeled product availability. California storage grapes are finished, resulting in very tight supply this week and into next, with green grapes being the shortest. We expect volumes to begin improving over the next ten days. Banana supplies are expected to tighten going into the new year, with challenges anticipated on spot market business as growers navigate increased global demand combined with virus and economic pressures in tropical growing regions. Lime markets are showing upward movement as supply is impacted by holiday harvest schedules, declining older-crop production, and delays to new-crop harvests due to cooler weather. Volume is expected to remain light through January, and size substitutions may be necessary in the coming weeks.

We are seeing lighter arrivals from Guatemala due to rain and cold nights that have caused lower yields. While quality has been holding up, both cantaloupe and honeydew volumes are expected to be down for the next month.

Pineapple availability has improved slightly but remains limited, and shippers are asking that we continue to be flexible on pineapple sizes. Avocado harvests will be limited due to the holidays; however, supplies remain stable with good demand driven by retail promotions and lower-than-average pricing. Lenticel is still present but is typical for this time of year due to rain. Chile and Colombia seasons are going strong, with limited volume currently landing in the U.S.

California and Baja strawberry regions received rainfall from Tuesday through Friday, delaying harvests across both regions. To maintain coverage, growers plan to utilize Central Mexico production loading through Texas, along with production loading in Florida, with Mexican product also supplementing California volumes for West Coast loading. These adjustments may require temporary substitutions of pack styles, labels, or specifications. In California, the summer-planted fall crops in Oxnard and Santa Maria are rapidly winding down as seasonal production concludes, and both regions are forecast to receive additional rainfall from Tuesday through next Tuesday, which is expected to further delay harvests and lower yields during this period.

Some regions have experienced heavy rainfall, and industry acreage remains down, with recent rains providing little relief to overall supplies. Several commodities are still ahead of harvest schedules, resulting in lower yields and lighter weights, largely due to early rain events in Yuma. While conditions continue to improve week over week, some items are still struggling to regain stability. Brussels sprouts, broccoli, broccolini, and green onion supplies remain extremely limited. Baby and tender leaf items have improved. Italian parsley and spinach remain very tight, with growers holding to strict averages where possible, though some prorates are expected. Spinach markets remain escalated. For Brussels sprouts, Ippolito will continue covering approximately 50% of averages across all pack sizes for at least the next two weeks and currently has no jumbo sprouts available—only medium and small sizes. Other Brussels

sprout growers are also tight and adhering closely to averages where possible, with some prorating expected, though not as severe as Ippolito's reductions. In broccoli, some growers are experiencing pin rot, water spotting, and smaller sizing. While conditions are improving, limited yields have caused the market to escalate again, and yield challenges are expected to persist through year-end. Broccolini supplies have also tightened significantly, with very limited availability across the industry; growers are holding to strict averages and prorates may soon become unavailable. Green onion supplies remain extremely limited, as previous rains in Mexican growing regions have significantly impacted yields, resulting in prorates from multiple growers. Limited supplies are expected to continue through the end of January, as plantings over the next four to six weeks have been adversely affected by rain, prompting a Market Alert. Cilantro supplies remain tight and escalated. The celery market remains high and is expected to stay elevated through the end of the year, with tight supplies and growers holding to averages where possible; however, following recent storms, severe prorates should be expected, and an additional Market Alert will be issued once more information becomes available later this week. Anise/fennel, leeks, and napa cabbage also remain escalated, with ongoing quality and supply challenges despite growers' efforts to ship the best product possible. Celery, green onions, parsley, and Brussels sprouts remain the most challenging commodities, where prorates are unavoidable. While frost and ice are not currently significant concerns, we will continue monitoring conditions closely and provide updates as necessary.

Please be aware that upcoming rain and continued fog will affect citrus harvesting into the new year. The navel crop is beginning to tighten on smaller sizes (138/113/88). If you are able to substitute larger sizes, those are more readily available. Lemons remain readily available, peaking at 140 count; however, some shippers anticipate larger sizes becoming slightly more snug, so please plan accordingly. Red Rio grapefruit is the primary variety currently being packed, with the crop peaking in a 40/36 size structure. Some shippers are wrapping up California production and are only loading out of Texas, so please stay in close contact with your suppliers regarding grapefruit loading locations. Mandarins are readily available and looking great; additional lead time is requested on orders, with the crop peaking on 32/36. Cara Cara oranges have started and are becoming more available across all sizes. Blood oranges are starting slowly, with pale color expected initially; by January, more classic blood-orange characteristics will begin to develop. The California garlic crop is reporting steady supplies, though availability is expected to tighten as the year progresses. Maintaining averages is recommended to ensure continued coverage as the season advances.

### **Alert List**

- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Bok Choy – **ESCALATED**
- Boston/Butter Lettuce – **EXTREME**
- Broccoli – **ESCALATED**
- Brussels Sprouts – **EXTREME**
- Brussels Sprouts VA – **EXTREME**
- Celery/Celery Sleeved – **EXTREME**
- Cilantro – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Hot Pepper: Poblano, and Habanero – **ESCALATED**
- Kale – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce Iceberg, Cello – **ESCALATED**
- Limes – **ESCALATED**
- Napa – **ESCALATED**
- Green Onions – **EXTREME**
- Parsley Italian – **ESCALATED**
- Red Leaf – **ESCALATED**
- Romaine/VA Blends – **ESCALATED**
- Romaine Hearts – **ESCALATED**
- Spinach – **ESCALATED**

- Snow Peas & Sugar Snap Peas – **EXTREME**
- Strawberries – **ESCALATED**
- Table Grapes – **EXTREME**
- Tomatillo – **EXTREME**
- White Asparagus – **ESCALATED**

### Watch List

1. Bananas
2. Blueberries
3. Broccolini
4. Cabbage, Red
5. Cauliflower
6. French Beans
7. Herbs
8. Lettuce
9. Limes
10. Pineapple
11. Ginger
12. Melons - Cantaloupe and Honeydew
13. Mushrooms
14. Small Oranges (138/113/88)

### Weather

#### **YUMA, AZ**

Tue 12/30	Wed 12/31	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
74°   59°F 	65°   54°F 	68°   56°F 	72°   56°F 	72°   54°F 	74°   53°F 	73°   53°F 	71°   55°F 	70°   52°F 
Mostly Cloudy	Cloudy	Partly Cloudy	Mostly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

#### **OXNARD, CA**

Tue 12/30	Wed 12/31	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
71°   59°F 	62°   56°F 	62°   58°F 	63°   58°F 	63°   51°F 	62°   49°F 	62°   50°F 	63°   52°F 	63°   51°F 
AM Light Rain	Showers/Wind	Rain	Showers	Showers	Showers	Showers	Showers	Mostly Cloudy

#### **CULIACAN, SINALOA**

Tue 12/30	Wed 12/31	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
92°   64°F 	88°   68°F 	91°   63°F 	93°   59°F 	90°   58°F 	89°   59°F 	90°   59°F 	91°   59°F 	88°   58°F 
Mostly Sunny	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy

#### **HERMOSILLO, SONORA**

Tue 12/30	Wed 12/31	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
89°   63°F 	79°   61°F 	83°   59°F 	84°   56°F 	83°   56°F 	82°   56°F 	84°   55°F 	84°   57°F 	81°   56°F 
Cloudy	Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

#### **JALISCO, NAYARIT**

Tue 12/30	Wed 12/31	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
82°   58°F	79°   57°F	80°   56°F	80°   53°F	79°   54°F	79°   55°F	80°   56°F	81°   55°F	78°   53°F
 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Mostly Sunny	 Mostly Sunny	 Partly Cloudy	 Mostly Sunny	 Sunny

## VIZCAINO, BAJA

Tue 12/30	Wed 12/31	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
91°   65°F	88°   64°F	90°   62°F	91°   59°F	89°   59°F	89°   59°F	90°   60°F	90°   60°F	88°   59°F
 Mostly Sunny	 Partly Cloudy	 Mostly Cloudy	 Partly Cloudy	 Mostly Sunny	 Mostly Sunny	 Partly Cloudy	 Mostly Sunny	 Mostly Sunny

## IMMOKALEE, FL

Tue 12/30	Wed 12/31	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
65°   34°F	64°   36°F	71°   41°F	74°   48°F	77°   58°F	78°   53°F	79°   52°F	79°   51°F	79°   54°F
 Mostly Sunny	 Sunny	 Sunny	 Mostly Sunny	 Mostly Sunny	 Mostly Sunny	 Partly Cloudy	 Sunny	 Mostly Sunny

## Fruits & Vegetables

**Tariff Update:** President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. However, tariffs will be removed over the next two weeks, based on their arrival 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 Colombia until new trade agreements are reached.

**Avocados:** Overall volume for the U.S. remains strong, and the U.S. is on pace to surpass 3 billion pounds of avocado consumption by year-end. Sizing continues to peak toward 48s and 60s count, while dry matter remains in the high 20s. Due to seasonal rainfall, there is an increased presence of lenticel—small brown spots that develop on the skin after harvest, particularly during the rainy season. Lenticel has no effect on internal quality. The main crop now accounts for 90% of the total harvest volume. Industry harvest volumes in Mexico remain lighter this week due to the holiday period. Demand is expected to remain strong into January, with harvest volumes anticipated to increase starting next week to better align with industry needs. The current size curve remains strong on medium and large fruit, providing attractive price levels across all sizes.

**Bananas: WATCHLIST** Banana supply will begin to tighten over the coming weeks as global demand increases and production in the tropics steadily declines. A combination of virus pressure, low yields, and increasing production costs has placed significant strain on this staple commodity. Overall, banana quality remains very good, and supply is adequate. The key to navigating the coming year will be

consistency in supply, consistent ordering patterns, and staying proactive to address any potential issues that could impact the program.

**Pineapples: WATCHLIST** The pineapple market has begun to settle slightly but remains tight. Demand continues to be high, keeping pricing stable. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, quality and taste are good.

**Table Grapes: EXTREME** Storage fruit is finished out of California, and strong demand continues as the offshore season slowly ramps up. This week will be the tightest on availability, with vessel arrivals limited. We expect stronger markets through New Year's, gradually easing over the next ten days as more product arrives. Overall quality on offshore fruit has been good and is only expected to improve as the season progresses. We continue to recommend scaling back portions until mid-month as markets ease or consider substitutions with alternate options such as cut fruit over the next week to ten days.

### **Berries**

**Strawberries: ESCALATED** California and Baja received rainfall from Tuesday through Friday, delaying strawberry harvests across these regions. Additional rainfall is forecast for this week, which may continue to disrupt harvest schedules. To maintain coverage, growers plan to utilize Central Mexico production loading through Texas as well as production loading in Florida. Florida volumes are currently slightly reduced due to cooler temperatures, though warming is expected toward the end of the week, supporting improved production. Mexican product may also be used to supplement California volumes for West Coast loading, which could require temporary substitutions in pack styles, labels, or specifications. In California, the Oxnard and Santa Maria summer-planted fall crop is rapidly winding down as seasonal production concludes. Fall-planted Spring crops in both regions are coming online at an opportune time and are expected to help maintain steady supplies through the winter months. Quality remains good, with volumes forecasted to increase in early 2026. Baja Mexico is entering the early stages of its seasonal production, with volumes expected to build steadily and become more impactful after the start of the new year. Quality is good, and organic production is also ramping up, with overall volumes projected to increase in early 2026. Central Mexico continues to increase production on a weekly basis, with good overall quality and solid availability across current packs.

**Blackberries:** Production remains active in Central Mexico and Baja, with good availability across current packs. Overall quality is good; however, some instances of softness and red cell or color reversion are being observed due to recent heat, rainfall, and elevated humidity in the growing regions.

**Raspberries:** Production remains active in Central Mexico and Baja, though supplies have tightened as crops move past their seasonal peak, resulting in reduced availability. Overall quality remains good; however, some instances of soft or overripe fruit are being observed due to recent heat, rainfall, and elevated humidity in the growing regions.

**Blueberries: WATCHLIST** Production continues in Central Mexico with good availability. Mexican quality and sizing remain very good across current packs.

### **Citrus**

**Limes: ESCALATED** Supply will be short this week due to the holidays impacting harvesting in Mexico. Larger fruit is still expected this week; however, availability will begin to decline as older crop fades, with a slight drop in quality. New crop is ramping up slower than expected due to cooler weather in Southern Mexico. Long-term, some size and price vulnerability is expected going into January.

**Small Oranges: WATCHLIST** Small fruit is very tight and is expected to continue tightening as harvesting is affected by rain and fog.

#### **West Coast Lettuce**

**Iceberg: ESCALATED** Lettuce quality and supplies are okay, with weights remaining light. The market is active, and weather has affected both harvesting and quality. While the market is not currently escalated, growers expect it to rise again after the holidays. Growers are monitoring for soilborne diseases, particularly in crops planted during heavy rains.

**Iceberg VA: ESCALATED** Quality and supplies are good.

**Romaine & Romaine Hearts: ESCALATED** Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, mechanical damage, light weights, fringe burns, and light cupping. For the hearts, very little heart material is available. Weather has impacted both harvesting and quality.

**Romaine VA: EXTREME** Quality is okay, and supplies are good. Weather has affected harvesting and overall quality.

**Boston/Butter Lettuce: EXTREME** Quality is okay, but supplies are tight. Mildew and fringe burn pressure have been observed, and weather continues to affect harvesting and quality.

**Green Leaf, Better Burger and Red Leaf: ESCALATED** Quality is good, and supplies have improved. Mildew and fringe burn pressure persist, and carton weights remain light, though conditions are improving. Weather has impacted both harvesting and quality.

***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 arrival times 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 Colombia until new trade agreements can be reached.*

#### **Florida Weather Update**

*We are monitoring a cold front moving through the South this week that will dive deep into Florida. We expect reduced production for many items, as well as the potential for crop loss. The cold snap is forecast to extend as far south as Immokalee and is expected to keep temperatures well below normal for the next three days. We are closely monitoring this with our growers and will provide significant updates as needed.*

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

**Color Bell Pepper:** We are starting to see more volume crossing through Nogales on open field as well as hothouse blocky peppers. The desert is now finished until spring; with the transition complete and volume increasing, we expect markets to begin easing back over the next week to ten days. Quality is good across all colors.

**Mini Sweet Pepper:** Supply is steady this week, and quality is good.

**Mixed Chili Pepper: ESCALATED** Supplies are expected to increase through December, which will improve both quality and availability. Downward pressure on pricing is also anticipated. Growing conditions are optimal in Sinaloa and Sonora. Markets will remain escalated for habanero, poblano, and tomatillo through Christmas.

**Tomatillo: EXTREME** Due to recent weather-related pressure, we are seeing a severe decrease in fresh tomatillo crossings. In addition to reduced volumes, specification variations are mostly related to smaller sizing being available. Over the next 7–10 days, shortages and prorates are expected, and no peeled product will be available.

**Eggplant:** Domestic supply is steady out of Florida, while crossings through Nogales remain strong. Quality from both regions is very good.

**Slicer Cucumbers:** Supply crossing through Nogales and McAllen is steady this week, and quality is outstanding. Domestic supply will quickly transition to South Florida as Georgia lost most of its crop due to weather. Quality is good across all growing regions this week.

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

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

**Green Beans:** Post-holiday demand is down, and stable supply from Mexico is expected to continue. In Florida, we may see a slowdown due to the cold weather moving through the state this week. The long-term forecast, barring any issues in Florida, remains steady through January. Overall, quality is good.

**French Beans: WATCHLIST** Guatemalan production and quality remain strong, with supplies considered okay. Mexican French bean availability is also fair, supported by steady production, though quality has been inconsistent.

**Zucchini/Yellow Squash:** Supply is stable, and quality is good from Florida as well as through McAllen and Nogales.

**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. Italian parsley is extremely limited from some growers and prorates should be expected.

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:** We are now seeing a drop in arrivals for both cantaloupe and honeydew due to weather-related issues during the growing cycle. The next growing areas may not be ready until the first or second week of January.

**Cantaloupe:** Cantaloupe production will be reduced, but enough product is expected to ensure all commitments are covered, leaving very little for daily open-market business. Sizing will be primarily 9s, followed by jumbo 9s. Smaller fruit will be fairly limited over the next few weeks. Quality has been good overall, with a slightly greener cast, but the fruit has been cutting very well. Brix levels mostly range from 12–14%.

**Honeydew:** Honeydew production is extremely limited, as these plants were impacted more by the wet and cooler weather experienced during the growing cycle. We expect honeydews to be a challenge for at least the next two weeks, with improvements likely around the week of January 12 arrivals. Flexibility on sizing will be required during this period. Scarring is a common characteristic at this time of year, and mud/dirt will also be seen.

**Watermelon:** Domestic watermelons are limited to Florida and are winding down for the season; production will resume in early April. Offshore watermelons from Guatemala have arrived, providing a steady supply of both cartons and bins. Supply of Mexican watermelons via Texas and Nogales is steady, and quality is good. Markets are escalated and expected to remain so through New Year's.

### **Mixed Vegetables**

**Artichokes:** **ESCALATED** Quality is good, but supplies are extremely limited. Growers are holding to strict averages, and there may be some substitutions on sizes. Large sizes are extremely tight, with growers mainly subbing 12ct and 18ct when possible. These sizing issues are expected to last at least through the end of January. Artichokes 24ct are at the extreme trigger.

**Asparagus:** **ESCALATED** Mexican production has slowed due to recent weather challenges, regional transitions, and logistical constraints, keeping supplies tight and expected to remain so through January. There is potential for early Caborca production in January, which could provide some cost relief, though this remains highly weather dependent. Peruvian volumes continue to build in the northern Trujillo region, while production in the southern Ica region is tapering off as the season winds down, shifting the size profile toward more small and standard fruit. Overall, Peruvian supply is expected to remain steady through January, though rising temperatures will require close monitoring of quality.

**Bok Choy:** **ESCALATED** Quality and supplies are okay

**Broccoli Florets/Broccoli Crowns:** **ESCALATED** Quality is okay, but supplies are extremely limited with some growers. The market has once again escalated. Reports of browning, pin rot, and insect larvae continue. Some growers are still prorating. Organic broccoli remains at the extreme trigger. Weather has affected harvesting and quality, and yields will continue to be challenging into the new year.

**Broccolini and Sweet Baby Broccoli:** **WATCHLIST** Quality is good, but supplies are still limited with most growers. Weather has affected harvesting and quality. Growers are holding to strict averages, when possible, but prorates may occur through year-end.

**Brussels Sprouts:** **EXTREME** Supplies are extremely limited, with growers struggling with yields. Insect pressure and internal browning continue to be reported, and overall quality is okay. The market remains at the extreme trigger, with severe prorates expected. Growers are covering approximately 50% of weekly averages. Mid-December is when Mexican sprouts begin to enter the market, so quality and supply issues are expected through early January 2026.

**Carrots (JUMBOS, MEDIUMS and CELLOS):** Due to continued rain events, supplies are tight on baby carrots, Cellos, and Jumbos, with limited availability. Rainbow carrots remain steady with good quality and supply. Harvesting has been challenging because of muddy fields. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Production is strongest in Guanajuato and Puebla, with volumes shifting toward Puebla as the year progresses. Rainfall has affected harvesting for some growers. Cellos and Jumbos are the most heavily impacted, and availability will remain limited until conditions improve. Growers request orders be sent in as early as possible.

**Cauliflower:** **WATCHLIST** Quality and supplies are good. Organic cauliflower is at the extreme level.

**Celery:** **EXTREME** Quality is okay, and supplies are extremely tight. Market prices continue to trend upward. Demand has risen due to the holidays and football season. Weather has affected harvesting and

quality, and recent storms are expected to cause severe prorates and quality issues. A Market Alert will be sent once the full impact is assessed.

**Corn, Sweet:** Overall supply is lighter from Florida and Mexico. Markets were firmer this week, and quality is good.

**Fennel: ESCALATED** Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

**Kale: ESCALATED** Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

**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 improving. Quality is good. Some growers are still holding to averages, and weather continues to affect harvesting and quality, potentially causing supply issues. Yields are expected to remain challenging through the holiday season.

**Green Onions: EXTREME** Supplies are very inconsistent, and quality is okay. Some growers report being completely out of supply. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging into January. Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to very strict averages, when possible, but prorates should be expected for at least the next two weeks. Plantings for the next 4–6 weeks were affected by prior rains, and yields are likely to remain an issue until the end of January. A Market Alert has been sent.

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

**Napa Cabbage:** Quality is good, but supplies are tight. The market is increasing.

**Parsley (Italian & Curly):** Supplies and quality have been affected by recent rains. Like baby leaf items, parsley could not be harvested, and growers will need to catch up on supplies. Prorates should be expected. Weather has affected harvesting and quality, causing additional supply issues. Yields are expected to remain challenging into January.

**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: ESCALATED** Supplies remain limited. Reports of weak texture, discoloration, and wilting continue. Weather has affected harvesting and quality, causing additional supply issues. Yields are expected to remain challenging into January.

**Spring Mix:** Supplies are limited this week. Weather has affected harvesting and quality, causing additional supply issues. Yields are expected to remain challenging through the holiday season.

**Snow Peas and Sugar Snaps: EXTREME** Supply of Guatemalan snow peas and sugar snaps continues to build steadily. Peruvian production is at or near the end of the season, with volumes declining as part of the normal seasonal transition. Mexican snow pea availability remains limited due to ongoing field transitions, while Mexican sugar snap supplies continue to show gradual improvement.

#### **Onions:**

The onion market remains stable. With harvest concluded, all products will ship exclusively from storage in the Pacific Northwest. While modest increases may 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, while Norkotahs will continue to make up the majority of 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. Quality is outstanding.
- **Roma Tomatoes:** Supply will be lighter this week and struggling on color and expect some volatility this week. Overall quality is good out of Florida.
- **Snacking Tomatoes:**
  - **Grape Medley:** Supply will remain tight over the next week; we hope to see more volume come on as the growing conditions continue to stay favorable.
  - **Grape Tomatoes:** Supply is steady and quality is good.
  - **Cherry Tomatoes:** Supply is steady and quality is good.

#### **Mexico**

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

- **Roma Tomatoes:** Excellent supply this week as growers break new fields, however, still expect some volatility this week should the National Market improve. Overall quality is good
- **Snacking Tomatoes:**
  - **Grape Medley:** Supply is lighter this week and quality is outstanding.
  - **Grape Tomatoes:** Supply is steady and quality is good.
  - **Cherry Tomatoes:** Supply is steady and quality is good.

### **Other Fruit:**

**Apples:** The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

**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.