

## Weekly Market Review

August 22, 2025

### Overview

**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.*

Demand on Tomatoes seems to be off this week going into the weekend; this is a combination of more supply coming out of Tennessee and Virginia as well as Mexico starting newer blocks. Rounds seem to be the strongest, particularly larger fruit keeping upward pressure on FOB prices. Grape Tomato supply is good out of all regions as are other varieties in the snacking category. Roma demand is down this week and price is reflective. Quality across the entire category out of Mexico is excellent while domestic fruit was fair out of North Carolina and Tennessee. California production was down slightly this week keeping FOB prices higher in the West. Production on Mixed Veg will continue to be challenging on Color Pepper but does seem to be easing off some. The tightest items continue to be Color Bell Pepper and Red Fresno. Grape season is well underway in California; quality and supply are excellent, and we should see steady markets now through late October. Melon supply out of Firebaugh is steady and quality is outstanding. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. New crop available out of California on yellow/white Peaches/Nectarines, red/black Plums and Apricots. There are also Peaches available in the East out of Georgia and South Carolina with Cherries out of Washington State. Mexico's Loca crop continues to perform as expected, with strong availability on 48ct and 60ct Avocados. Attention is now shifting to the upcoming Aventajada crop, which is projected to bring ample volume and a return to a more balanced size curve, with increased availability of 48s and larger that have been limited in recent years. Both California and Peru are expected to remain present in the market well into October. Markets are expected to remain stable for the next several weeks. Shipping delays continue out of Guatemala, where warm weather is still affecting production. On top of this, there are reports of a potential strike that could create further delays and possibly lead to a gap in supply on the East Coast for certain commodities. These can include Heirloom Tomatoes, Snow Peas, Sugar Snap Beans, French Beans, Baby Peeled Carrots, and Rainbow Baby Peeled Carrots. Salinas is heating up! Temperatures for the remainder of this week and early next week will be warm. The warmer weather will bring on some more insect pressure and will cause some rapid growth on some of the commodities. Insect pressure and INSV has been reported in the fields for Lettuce, Romaine, Leafy Greens and Broccoli. The Lettuce market is now at the extreme level due to limited supplies. We are still seeing lighter weights and lower yields due to smaller heads and increased insect pressure. You will notice that lettuce is less dense during this time. Growers are covering averages when they can. We have seen some prorates, but quality is still good. The industry is expected to see lighter Lettuce supplies for at least the next few weeks. Romaine Hearts and VA Romaine are still escalated. Fringe burn and INSV are present in some fields. Broccoli supplies have improved with the CA growers but we seeing heavy insect pressure, and the markets could start to react. MX growers still expect supply issues throughout the summer. Quality still seems to be good but with reports of increased insect pressure, quality issues could arise. Brussels Sprouts quality and supplies are improving. The market is no longer at the extreme level. It is still escalated but it is trending down. Fennel/Anise are still at the Extreme level. Supplies continue to be very tight. Sizing is small and growers are holding to 8 to 10-week averages. As of right now, it look like the market will stay limited for several weeks. Bok Choy, Napa, Endive, Escarole and Leeks remain escalated. School is back in session so

demand will continue to increase. Summer always bring quality and supply issues, and we can expect things to be a bit of a roller coaster for the next few months. Valencia Orange's appearance is excellent, and the juice content is high. Sizing is peaking at 88s, followed by 113s. Some growers are seeing some regreening on the oranges, causing extended gas times. With the gas time varying, please give as much lead time as possible. Choice Grapefruit is readily available, but most growers are requiring ample lead time for Fancy Grapefruits. Expect to transition into Pink Grapefruit within a couple of weeks. As we push towards the end of District 2's season, things are continuing to remain tight on small Lemons. Size structure is peaking at 140/115ct choice. 165/200ct Lemons are remaining extremely tight and are projected to remain tight through October. Fancy grade percentage is down this season due to high wind events, which have impacted fruit quality. Volumes are expected to continue to decline as we move into August. District 2's season is anticipated to taper off around mid-September and conclude fully mid-October. Weather conditions remain favorable. District 3 is projected to begin in mid-September. Growers continue to evaluate fruit across District 3 and are seeing volume fluctuations between regions. Early indicators point to a smaller overall crop this season, though fruit sizing has improved compared to last year. Please note that there is a global strain on Lemons. In Mexico, Early harvest is now underway in Mexico, with weekly shipments increasing from 15000 – 25,000 cases. While fruit is still maturing, sizing is trending toward 140s, 165s, and 200s, with grade currently leaning more toward Choice. Argentina continues to ship significant volume to Europe and Russia, with 5.1 million cases sent to Europe alone, a 75% increase over total volume shipped in 2024. Peak sizes remain between 95s, 115s, and 140s. While overall quality has improved compared to last season, it varies by supplier. U.S. shipments are expected to continue through mid-August, with roughly 85% of the crop now harvested. Chile has shipped close to 2.2 million boxes to the U.S. so far, with pack outs primarily being 115s, 140s, and 165s. Approximately 70–80% of the crop grade is Fancy. Total volume is projected to increase by about 5% over last year, reaching an estimated 21–22 million boxes. In recent weeks, Chile has averaged 115,000 – 175,000 cases per week into the U.S., with 70% of that headed to the East Coast. This pace is expected to continue as shipments to Asia and Europe remain strong. The California garlic crop has begun, and our partners are not currently taking on new volumes until they have a better idea of their crop. Please keep this in mind when adjusting commitments or requesting new volume!

#### **Alert List**

- Asparagus – **EXTREME**
- Bell Pepper: Red, Yellow and Orange – **EXTREME**
- Blackberries – **ESCALATED**
- Bok Choy – **ESCALATED**
- Brussel Sprouts – **ESCALATED**
- Cilantro – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **EXTREME**
- Chile Peppers (Serrano and Red Fresno) – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce/VA Lettuce – **EXTREME**
- Napa – **ESCALATED**
- Romaine Hearts/VA Blends – **ESCALATED**
- Sweet Corn – **ESCALATED**
- White Asparagus
- Tomatoes (Rounds) – **ESCALATED**

#### **Watch List**









1. Avocados
2. Broccolini
3. Broccoli
4. Cabbage
5. French Beans
6. Herbs
7. Lemons, Small Sizes
8. Limes (Large Sizes are short)

9. Pineapple
10. Ginger
11. Green Onions
12. Green Leaf & Red Leaf









13. Snow Peas & Sugar Snap Peas
14. Spinach
15. Spring Mix

## Weather









### **SALINAS, CA**

Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Mon 8/25	Tue 8/26	Wed 8/27	Thu 8/28
75°   54°F	72°   56°F	70°   56°F	70°   56°F	69°   56°F	68°   57°F	69°   57°F	71°   57°F
							
AM Clouds/PM	Partly Cloudy	AM Clouds/PM	Mostly Sunny	AM Clouds/PM	AM Clouds/PM	Mostly Sunny	Partly Cloudy









### **OXNARD, CA**

Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Mon 8/25	Tue 8/26	Wed 8/27	Thu 8/28
79°   64°F	79°   64°F	77°   65°F	77°   64°F	75°   62°F	74°   61°F	74°   62°F	74°   63°F
							
Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny









### **FRESNO, CA**

Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Mon 8/25	Tue 8/26	Wed 8/27	Thu 8/28
103°   74°F	107°   75°F	106°   74°F	105°   72°F	103°   71°F	102°   70°F	100°   69°F	97°   68°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny









### **HERMOSILLO, SONORA**

Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Mon 8/25	Tue 8/26	Wed 8/27	Thu 8/28
105°   84°F	105°   83°F	106°   84°F	104°   83°F	97°   80°F	97°   81°F	98°   82°F	101°   81°F
							
Mostly Sunny	Mostly Sunny	Sunny	PM Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Mostly Sunny	Partly Cloudy









### **JALISCO, NAYARIT**

Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Mon 8/25	Tue 8/26	Wed 8/27	Thu 8/28
80°   65°F	79°   65°F	80°   66°F	82°   65°F	81°   65°F	81°   65°F	83°   65°F	83°   66°F
							
Scattered Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms









### **VIZCAINO, BAJA**

Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Mon 8/25	Tue 8/26	Wed 8/27	Thu 8/28
92°   73°F	90°   74°F	91°   74°F	92°   73°F	91°   73°F	92°   73°F	93°   74°F	93°   74°F
							
PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	Thunderstorms	Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms

### LIBERTY, TN

Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Mon 8/25	Tue 8/26	Wed 8/27	Thu 8/28
84°   66°F	87°   69°F	83°   67°F	86°   58°F	83°   58°F	78°   53°F	79°   53°F	82°   58°F
							
AM Clouds/PM Sun	Partly Cloudy	PM Thunderstorms	Partly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy

### HENDERSONVILLE, NC

Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Mon 8/25	Tue 8/26	Wed 8/27	Thu 8/28
80°   63°F	80°   59°F	80°   62°F	83°   66°F	83°   61°F	78°   58°F	75°   54°F	77°   56°F
							
Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly 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, 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: WATCHLIST** Last week closed at 63.6 Mil lbs. for the U.S., all COO's remained relatively flat week-over-week. Jalisco currently accounts for 17.3% of Mexico's shipments to the U.S. The Main Crop is reporting dry matter levels averaging 38%, while the Off-Bloom (Loca/Mendez) crop is averaging 25.5% and peaking on 48s and 60s. Approximately 5.6 million pounds were harvested in week 33 from California. Dry matter is averaging 30%, with sizing peaking on 48s and 60s. Weekly harvest volume continues to come in under projections, though fruit quality remains excellent. The under projections are due to growers holding back in hopes of stronger markets in September. When California first opened for the season, USDA on 48ct was in the \$70s, so current price points are not a good motivation to harvest strong volumes. Peru, needing to continue moving volume to get through their heavy crop, has been maintaining a consistent level of supply these last 6 weeks. Markets saw pricing decline on larger fruit, while 60ct and smaller reported increases.

**Bananas:** Banana supply remains stable despite strong demand for school business rapidly ramping up. Overall, banana quality has been very good. We will continue to advise distributors and customers to keep a close eye on ripeness throughout the summer months; warm weather can lead to fruit ripeness running away from you. Proper storage temps and sufficient air flow where product is being stored is critical during these warmer months.

**Pineapples: WATCHLIST** Pineapples will remain tight for some time due to low production in Central America. We are suggesting flexibility in sizes to ensure stability of the supply chain. Overall quality and taste are good. We will see an additional 5% reciprocal tariff applied to this category over the coming weeks as the Federal Government implements additional tariffs to countries that have not finalized trade deals; this is still very fluid this week and will provide updates as soon as possible.

**Table Grapes:** Now in full production out of California; quality and supply are stable on Flames, Sugraones and Ivory varieties.

### **Berries**

**Strawberries:** Production in Salinas and Watsonville is beginning to slow as the season moves past its peak and into the natural decline, with overall volumes expected to dip further through August. Fall crop harvest is set to begin this week in Santa Maria, with Oxnard following in September. Quality remains strong, though wet and foggy mornings have increased instances of bruising and decay. QA teams and harvest crews are addressing this by culling sub-par fruit in the field to maintain a premium pack. The fruit itself is showing full color, medium to large size, and continues to eat very well.

**Blackberries: ESCALATED** Production is active in Central Mexico (CMEX) and Oxnard, with Oxnard expected to continue through early September. CMEX will steadily increase each week heading into the fall. Baja and Watsonville have not yet started; Watsonville will begin in a very light way next week with gradual increases, while Baja is set to begin in late August and run through mid to late September. Overall supplies remain very limited, and quality is mixed by origin, with some reports of softness, leakage, and color reversion, though pack outs are still grading well. Demand is outpacing supply, and pricing will remain elevated until volumes improve in the coming weeks.

**Raspberries:** Production is ongoing in Central Mexico (CMEX), Baja, and Watsonville, CA. Both CMEX and Baja remain steady with good quality, while Watsonville volumes are trending down as the region moves into a seasonal supply gap. Additional volume is expected to return from Watsonville by late August to early September. California raspberries continue to show excellent quality, with sweet, aromatic, full-red berries that are eating exceptionally well.

**Blueberries:** Production remains active in Central Mexico (CMEX), Oregon, and Washington. CMEX volume is set to ramp up steadily through August, while the Pacific Northwest is now past peak production. Weather forecasts are calling for potential rain this weekend, which could create challenges in many growing areas. Early imports from Peru are expected to begin arriving in the coming weeks. Overall supply is steady, and quality continues to be very good.

### **Citrus**

**Lemons: WATCHLIST ON SMALL SIZES (165's and below)** Lemons are looking extremely tight as we continue towards the end of summer. Most shippers are holding to averages, particularly on the smaller sizes. Fancy grade percentage is down this season due to high wind events, which has impacted fruit quality. There will be little to no relief on the import side of the market if you are not participating on an import program.

**Limes: WATCHLIST Supply** is extremely tight this week on all sizes with larger sized fruit being the shortest. We do expect to need to start subbing sizes next week for larger fruit as we start newer crop.

Short term forecast is lighter supplies through Labor Day at the earliest and pricing is to continue an upward trend for the coming 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 good, but supplies are limited. The market is now at the extreme level. We are still seeing lighter weights and increased demand. There have been some reports of INSV. There is some light to moderate levels of Scalero, fusarium and thrip damage. There have been lower yields from the smaller framed lettuce heads and increased disease pressure in the fields. Some growers are holding to averages and we have seen some prorates. Growers are also subbing labels to try and cover orders when possible. The soil borne diseases have really limited the harvestable acres. You will see smaller heads and they will not be as dense as they normally are. The market is very active and will be a roller coaster over the summer as growers try and navigate the issues with the yields.

**Iceberg VA: ESCALATED** Quality and supplies look okay. Some growers are holding to averages and we have seen some prorates.

**Romaine & Romaine Hearts: ESCALATED** Romaine and Romaine heart quality are okay, but supplies are light. There have been some reports of fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Some growers are holding to averages. Romaine, Romaine Hearts and Organic Hearts are all still escalated.

**Romaine VA: ESCALATED** Quality and supplies are okay, but we are keeping an eye on insect pressure and the weather. Some growers are holding to averages and the market is still escalated.

**Green Leaf and Red Leaf: WATCHLIST** Quality is good, but supplies are a bit light. We have seen mildew and fringe burn pressure. We are seeing lighter carton weights.

### **Eastern and Western Vegetables:**

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**Green Bell Pepper:** Steady supply available from all growing regions Quality is good and will continue to improve over the coming weeks.

**Color Bell Pepper: EXTREME** High demand and very short supply out of the east and west coasts have driven markets to record highs this week. Canada and Mexican production will remain steady on 11# all sizes but prices are up. Transitions and rain delays domestically have caused these shortages. Quality is mixed; you will see a lot of greener skinned fruit this week and next, but overall quality will be fair. We

expect to see short markets continue over the next 7-10 days and recommend scaling portions for subbing green for color pepper where necessary while we navigate these shortages.

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

**Mixed Chili Pepper: ESCALATED** Supplies are generally good across most varieties out of Mainland Mexico, Baja and California this week. Serrano and Red Fresno are the tightest this week; Red Fresno being so tight for the coming weeks we recommend subbing to red jalapeno.

**Eggplant:** Domestic supply is steady out of Fresno and the Local regions in the east. Quality is good.

**Slicer Cucumbers:** Stable supply crossing through Otay and McAllen. Domestic supply was also stable out of North Carolina, Michigan and Tennessee. Quality is outstanding in the west and fair in the east.

**English Cucumbers:** Lighter supply available this week. Quality is good.

**Pickles:** Light supply expected over the coming week out of Michigan and Tennessee. Quality is good.

**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, though minor quality issues may occur due to heat and shipping delays. Mexico continues to provide a fair supply of French beans.

**Zucchini/Yellow Squash:** Loading new crop out of the Carolinas and Tennessee, markets have eased back. In the west, we are now in full production out of Fresno and Baja. Quality is good.

**Herbs: WATCHLIST** In the East, basil quality and supply remain strong from Colombia and Mexico, while tarragon production continues to be light. Mint supply is beginning to decline due to weather, and imported chervil from Ecuador remains limited. In the West, basil supply and quality are also strong, with steady availability on most other herbs. Chervil and marjoram remain limited due to weather-related challenges, and overall herb quality may be inconsistent in some areas due to heat.

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**

**Cantaloupe:** Fruit quality is outstanding; we are seeing good shell and internal color in the fields; brix levels mostly in the 14-16% range consistently. Sizing distributions is starting to improve with a good mix of 9's and 12's available; some 15's as well. Supply should be steady through Labor Day, barring any unforeseen weather that could impact the crop.

**Honeydew:** Honeydew production has leveled off and the crop is producing a fair distribution of 5's and J6's; 8's are very limited. We do expect supply and sizing to remain stable for the next several weeks. Quality is excellent; mostly clean shell, we are seeing occasional scarring on these first picks. Brix levels on the dewes are mostly in the 14-16% range.

**Golden Honeydew:** Good supply available on 5 and 6J's; quality is outstanding.

**Watermelon:** Watermelon volume is very good out of multiple districts including California, Arizona, Michigan, Illinois, North Carolina and Missouri. Quality is outstanding.

### **Mixed Vegetables**

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### **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.*

**Artichokes:** Quality and Supply are good.

**Asparagus: EXTREME** Baja and Guanajuato production remains low due to seasonal transitions, while cooler weather continues to limit Peru's output. This trend is expected to persist through at least Labor Day. Sizing across all regions is dominated by small and standard fruit, with very limited availability of larger sizes. Markets remain extremely active as reduced supply and ongoing sizing challenges drive stronger demand.

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

**Broccoli/Broccoli Crowns: WATCHLIST** Quality and supplies are improving. Insect pressure (diamond back moth) has been reported and is affecting yields. The insect pressure is limiting harvest. MX still has extreme shortages. The market is no longer escalated, but some growers are still holding to averages. Organic Broccoli is still triggered.

**Broccolini and Sweet Baby Broccoli: WATCHLIST** Quality and supplies are good.

**Brussels Sprouts: ESCALATED** Supplies have improved. Insect pressure and internal browning have still been reported but quality is also starting to improve. We are also seeing some elongated stems due to the rapid growth from the heat. The market is still triggered but is trending down. We should see things improve by the end of the month.

**Carrots (JUMBOS, MEDIUMS and CELLOS):** The Desert growing regions are finishing for the season and will be transitioning to the Central San Joaquin Valley and southern Monterey County growing regions for the summer with good supplies and very good quality.

**Cauliflower:** Quality and supplies are good. Organic Cauliflower is escalated.

**Celery:** Quality and supplies are good right now.

**Corn, Sweet: ESCALATED** Markets are slowly easing back as newer districts start to ramp up production. We should see the gradual decrease in FOB pricing and more availability over the coming weeks. In the west, Tracy and Brentwood are now in full production. Quality is good in all locations.

**Fennel: EXTREME** 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** have improved, and quality is good.

**Leeks: ESCALATED** Leeks are very tight right now and some growers are holding to averages. The market remains escalated.

**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: WATCHLIST** Supplies and quality look good, but we are seeing poor yields in the VA cabbage as growers are trying to limit the core in the finished product.

**Green Onions: WATCHLIST** Supplies and quality look good but there have been some initial reports of light supplies.

**Mushrooms:** Promotable volume available and quality is good.

**Napa Cabbage: ESCALATED-** 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:** Quality and supplies are good.

**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 warm soil temperatures are leading to rapid growth.

**Spring Mix: WATCHLIST** Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. We have added this item to the watchlist.

**Snow Peas and Sugar Snaps: WATCHLIST** Quality on Guatemalan snow peas and sugar snaps remains steady, with improved volume anticipated in 7–10 days, weather permitting. Peruvian production is consistent with fair quality, while domestic supply of both items continues to be limited.

### **Onions:**

The onion market is not expected to see significant movement during Q3. Ample supply from California and New Mexico is anticipated to carry through the first half of the quarter, while the Northwest is projected to have a strong crop this season. The latter half of Q3 will largely be a "harvest market," meaning onions will need to ship fresh and cannot be stored, regardless of market conditions. Looking ahead, the long-term outlook for the Northwest is less favorable going into next year, despite

expectations for similar or increased acreage compared to last season. Barring any major weather disruptions, the industry should have more than enough supply to meet and exceed demand across all colors and sizes for the remainder of the calendar year.

### **Potatoes:**

While the market has remained relatively flat for most of the calendar year, we're now beginning to see supply tighten and prices inch upward. The first half of Q3 is expected to be tighter than we've seen in some time, with current supply constraints primarily affecting larger-size cartons (40ct through 70ct). However, as we approach the end of the storage season, availability across all sizes and grades is expected to become more limited. The second half of Q3 will transition into new crop Norkotahs, ushering in typical "harvest market" conditions. Pricing is anticipated to begin slightly higher than where storage crop Burbanks will finish but should gradually decline as harvest volumes ramp up. Acreage in Idaho is expected to be similar to last year, and assuming no major disruptions, we can anticipate a market similar in tone and behavior to the previous season.

### **Tomatoes:**

#### **Tomato Suspension Agreement Update**

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### **East Coast**

- **Round Tomatoes: ESCALATED** Supply is slow to improve due to weather out of North Carolina and Tennessee while new production starts in Virginia and New Jersey. Current quality will be mixed; several days of heat, rain and high humidity are causing several post-harvest issues days after the fruit is packed.
- **Roma Tomatoes:** Volume is slow to start this week but that combined with a flush of fruit in Mexico and soft demand has pricing down this week. Quality is mixed in the east and Outstanding in Mexico.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Lighter supply available as we emerge from fields that were impacted by rain. Quality is gradually improving.

### **Mexico**

- **Round Tomatoes: ESCALATED** Volume will slowly improve over the next week, crossing through McAllen and Otay. Medium sizes are short as demand has increased due to a lack of domestic round supply this week. Quality is excellent.
- **Roma Tomatoes:** Production is strong this week out of Jalisco, San Luis Potosi and Baja. Quality remains good.
- **Snacking Tomatoes:**
  - **Grape Tomatoes:** Good 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:** Lighter volume this week available through McAllen and Otay. Quality is mostly good.
- **Tomato on the Vine:** Stable volume available this week.

### **California**

- Rounds and Romas: **ESCALATED** Lighter production and very high demand from the east have driven markets higher this week. Overall quality is good.

### **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:** Limited availability.

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

**Cherries:** Steady supply out of Washington, New York and Canada.

**Stone Fruit:** New crop Peaches, Nectarines, Plums and Apricots now available out of California. Peaches are now available in South Carolina and Georgia as well.

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

**Quince:** Limited supply available this week.