

Weekly Market Review

January 16, 2026

Overview

Production continues to be steady out of Mexico; we will need to observe Florida over the next few days as a series of cold fronts will bring cold temps to the state and could impact production across the entire state. Currently, overall quality is good on all commodities; we continue to see tighter markets on some Hot Peppers, Bell Pepper and Squash. This is primarily due to cooler weather in Mexico combined with the last cold snap that impacted South Florida a few weeks ago. Table Grapes are seeing some finally seeing relief as offshore volume continues to increase and fill the supply chain across the country. Good supply on reds, while green varieties are behind and are the shortest. Quality has been outstanding! The Lime market is active and large sized fruit is tighter this week as we drill into the newer regions, which are peeking on 200's and smaller currently. We expect volatility through Q1 as predicted. 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.

We are seeing better arrivals on Cantaloupes, but Honeydews continue to struggle from Guatemala due to rain and cold nights which caused lower yields. Quality has been holding up nicely with good brix levels on both. Pineapple availability has improved slightly but remains limited, and shippers are asking that we continue to be flexible on pineapple sizes.

After two consecutive holidays, Mexico rebounded strongly with a big harvest sending over 71 million pounds to the US. Demand will remain strong from now until the Super Bowl, and daily harvest will stay elevated to keep up with this demand. The current size profile continues to favor medium and large fruit, while small sizes are becoming more limited as the season progresses. 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 production continues to be impacted by recurring rain and persistent wet conditions. Intermittent rain events over the past 10 days have disrupted harvest activity, and this pattern is expected to continue into next week and potentially beyond. Crews have been able to harvest select fields as they work through rain related cleanup of damaged plants and fruit in Oxnard, Irvine, and Baja. To supplement supply during this disruption in California production, Mexican product is being transferred into California for West Coast loading. Please note that this fruit will have additional days in transit, and quality and shelf-life expectations should be adjusted accordingly. To preserve condition, this product should not be routed through cross-docks or longer cross-country lanes. Due to these production challenges, temporary substitutions in labels and pack sizes may be necessary to fulfill committed orders. Elsewhere, supplies are increasing and the quality is good.

The weather in Yuma continues to be warmer than normal, and that coupled with all the recent rain has been causing significant mildew on some Lettuce (Romaine, Iceberg and Green Leaf) and all Tender Leaf items. As a result of the mildew limiting harvestable acres, Spinach will remain escalated, and supplies will be limited. Arugula and Spring Mix will also be affected. You can expect to see quality issues, limited supplies, possibly prorates and shortened shelf life on all of those lettuce and tender leaf items. These issues are expected to persist throughout January. Overall supplies on Carrots, Celery and Green Onions continue to be extremely limited across the industry. Those 3 items are likely to see prorates. Green

Onions will continue to be limited, and we will likely not see relief fully until we get into February. The Celery fields that were significantly affected by the storms are still limiting the supplies that are available. Many acres were lost. Whole Celery will be held to strict averages, but you will see prorates on the VA Celery packs. The prorates will not be severe but 10-15% allocations should be expected on the VA items. Celery supply will remain limited until mid-February. Carrots are also being held to strict averages, you can expect to see the prorates on Cello's and Jumbos. Harvesting has been greatly affected by the rain and with the fog settling in, they are not getting the sun they need to dry up the fields. These issues are expected to last for the next 2-3 weeks. Brussels Sprouts have started to regain stability, but supplies are still very limited, and growers are holding to strict averages. While things are slowly improving, Sprouts will likely not have full relief for another 3 weeks. Italian Parsley and Cilantro remain very tight, with growers holding to strict averages where possible, though some prorates are expected. Asian Cut Broccoli remains escalated, but the rest of the Broccoli items are no longer triggered. Some growers continue to experience pin rot, water spotting, and smaller sizing which is resulting in limited supplies. We are watching this item closely and expect to see the market rise again if supplies do not firm up. Artichokes, Anise/Fennel, Leeks, and Napa Cabbage also remain escalated, with ongoing quality and supply challenges. Artichokes only have small sizes (12ct) available. Whole Carrots, Cilantro, Celery, Green Onions, Parsley, and Brussels Sprouts remain the most challenging commodities at this time. We are keeping a close eye on the issues with the mildew and weather and will continue to send out updates as we receive information. With the warmer weather and rain speeding up growth and causing quality issues, we are likely to see some gaps in supplies as the cooler weather starts to slow things down.

Lemons are available from both houses across all sizes, with fruit skewing toward a fancy grade and peaking on 140s and larger, followed by 165s and 200s. Harvest in District 3 will conclude at the end of January, aligning well with peak harvest in District 1, where heavy fancy-grade fruit is running primarily 115s, 140s, and 95s, followed by 165s. Heavy December rains are expected to support additional growth in Districts 1 and 2 further south, and a premium on 165s and 200s Lemons is anticipated this spring. For Navels, sizing is trending larger than prior estimates following the most recent rain event and continues to be evaluated. As a result, small navels will remain tight for the balance of the season, and customers are encouraged to stay in close contact with suppliers regarding potential substitutions, such as Mineolas or Mandarins (both will be opening back up in the next week or so). Mandarins have been the most impacted by recent rain and fog for some suppliers, while others are reporting some coloring issues; overall quality and supply are expected to improve within the next week or so. The fields have dried out and harvesting has resumed! Cara Cara Oranges are currently peaking on 88 FCYs, California Grapefruit has mostly concluded for the season, with current availability coming out of Texas and peaking on 40s, 48s, and larger sizes. 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 Crowns Asian Cut – **ESCALATED**
- Brussels Sprouts – **EXTREME**
- Brussels Sprouts VA – **EXTREME**
- Celery/Celery Sleeved – **EXTREME**
- Cilantro – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Hot Pepper: Red Fresno and Shishito – **ESCALATED**

- Leeks – **ESCALATED**
- Limes – **ESCALATED**
- Napa – **ESCALATED**
- Green Onions – **EXTREME**
- Parsley Italian – **ESCALATED**

- Spinach – **EXTREME**
- Snow Peas & Sugar Snap Peas – **ESCALATED**
- Strawberries – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List

1. Bananas
2. Blueberries
3. Broccoli
4. Broccolini
5. Cabbage, Red
6. Cauliflower
7. French Beans
8. Herbs
9. Lettuce
10. Pineapple
11. Ginger
12. Melons - Cantaloupe and Honeydew
13. Small Oranges (138/113/88)
14. Florida Warm Veg- Beans, Corn, Cucumber, Eggplant, Bell pepper, Soft Squash and Tomatoes

Weather

YUMA, AZ

Thu 1/15	Fri 1/16	Sat 1/17	Sun 1/18	Mon 1/19	Tue 1/20	Wed 1/21	Thu 1/22
82° 49°F	81° 52°F	80° 49°F	79° 48°F	78° 52°F	79° 50°F	77° 51°F	77° 51°F
							
Sunny	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy

OXNARD, CA

Thu 1/15	Fri 1/16	Sat 1/17	Sun 1/18	Mon 1/19	Tue 1/20	Wed 1/21	Thu 1/22
79° 52°F	75° 55°F	80° 55°F	72° 53°F	71° 55°F	73° 53°F	67° 51°F	65° 51°F
							
Mostly Sunny	Mostly Sunny	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

CULIACAN, SINALOA

Thu 1/15	Fri 1/16	Sat 1/17	Sun 1/18	Mon 1/19	Tue 1/20	Wed 1/21	Thu 1/22
92° 61°F	88° 63°F	90° 62°F	92° 64°F	90° 66°F	87° 63°F	91° 61°F	91° 61°F
							
Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny

HERMOSILLO, SONORA

Thu 1/15	Fri 1/16	Sat 1/17	Sun 1/18	Mon 1/19	Tue 1/20	Wed 1/21	Thu 1/22
90° 55°F	88° 54°F	89° 54°F	90° 56°F	85° 60°F	82° 57°F	86° 57°F	86° 58°F
							
Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy

JALISCO, NAYARIT

Thu 1/15	Fri 1/16	Sat 1/17	Sun 1/18	Mon 1/19	Tue 1/20	Wed 1/21	Thu 1/22
81° 58°F	77° 58°F	76° 58°F	81° 60°F	80° 58°F	76° 57°F	81° 56°F	80° 55°F
							
Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Cloudy	Mostly Sunny	Mostly Sunny

VIZCAINO, BAJA

Thu 1/15	Fri 1/16	Sat 1/17	Sun 1/18	Mon 1/19	Tue 1/20	Wed 1/21	Thu 1/22
90° 62°F	87° 63°F	88° 62°F	91° 64°F	89° 65°F	85° 61°F	90° 60°F	90° 61°F
							
Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Mostly Cloudy	Mostly Sunny	Mostly Sunny

IMMOKALEE, FL

Thu 1/15	Fri 1/16	Sat 1/17	Sun 1/18	Mon 1/19	Tue 1/20	Wed 1/21	Thu 1/22
66° 35°F	65° 47°F	76° 54°F	71° 37°F	65° 41°F	70° 46°F	75° 56°F	81° 62°F
							
PM Showers	Sunny	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Mostly Sunny	Partly Cloudy

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: Mexico had a 95.5-million-pound for week 2, with 71.1 million pounds shipped to the U.S. Sizing continues to peak toward 48s and 60s count, while dry matter has climbed to 30%. The main crop now accounts for 90% of the total harvest volume. Demand is expected to remain strong in January, harvest volumes have increased to better align with industry needs.

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: We are done with storage fruit and all into now crop from South America. Quality is outstanding. Markets are still firm, however, they are sliding as more fruit becomes available. Green fruit

does seem to be the tightest but expected to improve over the next 10 days. Green varieties available: Sweet Globes. Red varieties: Red Globes, and Sweet Flavor. There are also generic varieties on all three colors available this week.

Berries

Strawberries: ESCALATED The Oxnard and Santa Maria summer-planted fall crop is rapidly declining as seasonal production winds down. However, fall-planted spring crops in both regions are coming into production at the right time to support steady supplies through the winter months. Quality remains good, and volumes are expected to increase gradually as warmer and drier weather returns. Out of Baja, MX: both conventional and organic production are ramping up, with volumes forecast to increase week over week as warmer, drier conditions are expected in the immediate forecast. Central Mexico production remains steady but has begun to taper off after reaching peak volume over the past month. Overall quality continues to be good. Florida production is down approximately fifty percent compared to recent weeks due to cooler temperatures and reduced harvest estimates. With an increased risk of freezing or frost over the next seven to ten days, production from this region is expected to remain limited.

Blackberries: Production continues in Central Mexico and Baja with good overall availability. Quality remains good, though some softness and occasional red cell or color reversion are being reported as a result of recent heat, rain, and humidity.

Raspberries: Production remains active in Central Mexico and Baja, though supplies have tightened as crops move past seasonal peak volumes, 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 CMEX (Central Mexico), though supplies are tight as volume trends down from seasonal peak levels. CMEX quality and sizing remain very strong, and CMEX blueberry quality is reported to be significantly higher than offshore blueberry offerings currently in the market. Additionally, Peruvian and Chilean production is down.

Citrus

Limes: ESCALATED Supply will be short this week out of Mexico, Columbia and Peru. Size profile and very low volume due to rainfall seem to be the common impacts to the growing regions. As we get deeper into the new crop, we expect to see very light volume on 175's and larger. All regions are Peeking on 200's and smaller. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability is expected through March.

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: 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 due to yields being low because of mildew damage and cap leaves. Growers are monitoring for soilborne diseases, particularly in crops planted during heavy rains.

Iceberg VA: Quality and supplies are just okay. We have seen reports of short shelf life and mildew in bags.

Romaine & Romaine Hearts: Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, mechanical damage, light weights and mildew on the outer leaves. For the hearts, very little heart material is available.

Romaine VA: Quality and supplies are okay. We have seen more core in the bags and some mildew.

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: Quality is good, and supplies have improved. Mildew and fringe burn pressure persist, and carton weights remain light, though conditions are improving.

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Florida Weather Update

Growers are preparing for another series of cold fronts that will bring extremely cold temperatures to the entire state over the next few days. We will be assessing as this weather develops.

Green Bell Pepper WATCHLIST: Lighter supply this week due to cooler weather. Quality is still very good from Nogales, McAllen, and South Florida.

Color Bell Pepper: Steady volume and good quality available out of McAllen and Nogales.

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

Mixed Chili Pepper: ESCALATED Supplies are good out of Sinaloa and Sonora currently. Markets will be shorter this week on Red Fresno and Shishito Pepper. We hope to see improvement next week on the short items.

Tomatillo: Supply and quality are improving this week.

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

Slicer Cucumbers WATCHLIST: Supply crossing through Nogales and McAllen is steady this week, and quality is outstanding. Domestic supply will slow down this week with the cooler weather; Honduras will start shipping over the next week or so. 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 lighter out of Florida due to cooler weather. Steady crossings through Nogales and McAllen. Quality is good.

Green Beans WATCHLIST: Supply was lighter this week out of Florida due to the cooler weather that hit the region last week; this should improve over the next two weeks. Mexico is continuing to improve. The long-term forecast, barring any issues in Florida, remains steady throughout January. Overall quality is good.

French Beans: WATCHLIST Guatemalan production and quality remain good. Mexican French bean availability is fair, though cooler weather continues to impact yields.

Zucchini/Yellow Squash- WATCHLIST: Supply is lighter out of Florida and crossing through Nogales due to cooler weather. Pushing markets higher. Best quality is out of Mexico.

Herbs: WATCHLIST Basil supply and quality may be inconsistent due to cooler weather, with occasional tip burn possible during the winter months. Tarragon availability remains limited, with fair overall quality. Italian Parsley and Cilantro are 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: Cantaloupe volume has increased over the last week while Honeydew volume hit a rough patch that will leave availability limited early next week. Weather-related issues during the growing cycle continue to slow down production. The new growing areas are having a positive impact on supply, but it's slower than expected.

Cantaloupe: Production increased this week, adding a better size profile as well. There are a good mix of 9/12 and jumbo fruit available. Quality overall continues to be good. 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 26 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.

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 is improving across most sizes, with the exception of jumbo. Peruvian volumes remain steady, while production in the southern Ica region continues to slow due to normal seasonality, shifting the size profile toward more small and standard fruit. With improved availability from Mexico, markets have become less active and are showing signs of easing.

Bok Choy: ESCALATED Quality and supplies are okay

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality is okay, but supplies remain limited with some growers. Asian cut crowns are still slightly escalated and the rest of the Broccoli market is no longer escalated, but there is potential for escalations in the coming weeks. Reports of browning, pin rot, and continue. Organic Broccoli remains at the extreme trigger. Weather has affected harvesting and quality, and yields will continue to be challenging until at least the end of January.

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.

Brussels Sprouts: EXTREME Supplies are still limited but are improving. We are still combating insect pressure and internal browning. The market remains at the extreme trigger, but we should start to see some relief in the next few weeks. Growers will be holding to strict averages when they can, but some prorates should be expected. This is expected to last for the next 3 to 4 weeks.

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. Rainfall has affected harvesting for all of the growers. Cellos and Jumbos are the most heavily impacted. Prorates should be expected. Availability will remain limited until conditions improve (Approx. 2-3 weeks). ***Growers request orders be sent in as early as possible.***

Cauliflower: WATCHLIST Quality and supplies are good but supplies are expected to get tight over the next few weeks. Organic Cauliflower is at the extreme level.

Celery: EXTREME Quality is okay, and supplies are extremely tight. Weather has affected harvesting and quality, and recent storms are expected to cause prorates on VA items, Quality issues should be expected as they growers work through the affected fields.

Corn, Sweet: WATCHLIST We will see a split market on corn this week due to cold weather in Florida. Markets were higher out of Florida over Mexico. Quality is good out of Both regions this week. We will need to assess the quality in Florida after this week's cold weather.

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: 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 and quality are good.

Green Onions: EXTREME Supplies are extremely limited, and quality is okay. Some growers have reported being completely out of supplies. Weather has affected harvesting and quality, causing

additional supply issues industry wide. Yields are expected to remain challenging though 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 3–4 weeks were affected by prior rains, and yields are likely to remain an issue until the end of January. A Market Alert was sent out.

Mushrooms: 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): ESCALATED: Supplies and quality have been affected by recent rains. Prorates should be expected on Italian Parsley. Weather has affected harvesting and quality. Yields are expected to remain challenging throughout 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. We are also now seeing disease pressure and mildew which are further impacting yields. Yields are expected to remain challenging throughout January.

Spring Mix: Supplies are limited this week. Weather has affected harvesting and quality, causing additional supply issues. We are also now seeing disease pressure and mildew which are further impacting yields. Yields are expected to remain challenging throughout January.

Snow Peas and Sugar Snaps: ESCALATED We have a few growers struggling with quality and supplies in the Yuma area. This week and next week you may see growers holding to strict averages and maybe some prorates. They expect this to improve in the next 2 weeks. Supply of Guatemalan snow peas and sugar snaps continues to improve, with stronger gains in sugar snaps than snow peas. Mexican snow pea availability remains limited due to ongoing field transitions, while Mexican sugar snap supplies are plentiful.

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 and Roma Tomatoes: WATCHLIST** Supply will be lighter this week and struggling with color and expect some volatility this week with the cold weather that will impact the state this week. Overall quality remains good out of Florida short term and will need to be assessed after this latest weather event.
- **Snacking Tomatoes: WATCHLIST**
 - **Grape Medley, Grape Tomato, Cherry Tomato:** Supply was lighter this week, and pricing was higher. Quality remains good across the entire category.

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 Tomatoes:** Lighter supply and higher demand from the east has pushed prices up a tad and expecting that trend to continue this week with the cold weather in Florida. Quality is outstanding.
 - **Grape Medley:** Supply is tightened up this week, and we continue to see upward pressure with increased demand from the east as Florida is short due to the cooler weather. 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: Steady supply available out of Argentina and Chile.

Stone Fruit: Good supply on Peaches currently out of Chile.

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

Quince: Limited supply available this week.