



Weekly Market Review September 18, 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.*

The Tomato market has changed this week as volume increases, and demand is down; we are seeing stable supply from most shipping points. We are watching tropical weather that is making landfall and crossing through the desert southwest which may impact some late season crops in Southern California and Northern Sonora. Domestically production remains stable, and quality is fair out of Tennessee, Alabama and Virginia. Grape Tomato supply is good out of all regions as are other varieties in the snacking category. California production is mixed, and quality is good with fair demand. Grape season continues to be into excellent production and quality; we should see steady markets now through late October. Melon supply out of Firebaugh is starting to slow down slightly as we are now on the backside of the California deal; days are getting shorter, and local deals will wind down as well. Quality is outstanding. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes in particular. Pumpkins and Fall items will be available this week. Avocado volumes are projected to remain plentiful throughout Q4, with a strong skew toward 48ct and larger. For every load of 60ct harvested, roughly two loads of 48ct are produced, creating an opportunity to size up programs and run promotions on larger fruit. California and Peru will taper off heading into October, while Colombia prepares to begin its main crop, and Mexico continues to provide a steady supply with favorable pricing. With multiple countries of origin supporting the market, availability across medium, large, and jumbo sizes is expected to remain strong, and market stability is expected through the end of the year. APEAM's updated forecast projects a 12% increase in total crop volume to approximately 2.9 billion pounds, potentially equaling or surpassing the record 2020–2021 season. In addition, APEAM continues to enforce dry matter standards, releasing fruit for harvest only once the crop reaches a minimum average of 23%. We continue to see shipping delays in the east impacting Guatemalan products. Additionally, warm weather and rainfall are further affecting production and quality from Guatemala. This would affect snow peas, sugar snap peas, baby peeled carrots, colored baby peeled carrots, and French beans. Temperatures have remained cool in Salinas. Though we are still seeing some lingering effects of the warmer weather. Insect pressure and INSV continue to be reported in the fields for Lettuce, Romaine, Leafy Greens, Cauliflower and Broccoli. The Lettuce market is not escalated but there are still some growers with limited supplies. We are still seeing some lighter weights and lower yields due to smaller heads, soil diseases and increased insect pressure. The good news is weights and quality are improving. We should start to see better lettuce as we get into next week. Romaine Hearts are no longer escalated but fringe burn and INSV are still present in some fields. We will continue to keep an eye on Romaine and Romaine Hearts. Broccoli is still escalated, and we are seeing issues with supplies. We are seeing heavy insect pressure, and the cooler weather has slowed growth a bit. Some growers are holding to averages and some have had to prorate due to the loss of acreage. The Diamond back moth is expected to affect supplies throughout the Salinas season. MX growers still expect some supply issues but have seen increased supplies. Quality still seems to be good but with reports of increased insect pressure, quality issues could arise. Brussels Sprouts' quality is good, but supplies have once again gotten light. Growers are holding to averages. The market is still at the extreme level and that is being driven by low yields. We can expect the light supplies to continue through the end of the month. Fennel/Anise are still at the extreme level. Supplies continue to be very tight. Artichokes are also once again escalated to the extreme level. Sizing is small and growers are holding to 8 to 10-week averages. Bok Choy and Napa remain escalated. Summer continues to bring quality and supply issues. We can expect things to be a bit of a roller coaster for the next few months. The Valencia season is beginning to wind down for some shippers as we approach Fall and Navels ramp back up (mid-late October). Navels are projected to be overall larger this season, with smaller fruit remaining tight into 2026. As of now suppliers are not anticipating a gap while transitioning to Navels. The quality and flavor profile of the fruit is still looking great overall. Be aware that some shippers are holding averages on Valencia's. CA Pink Grapefruit is projected to go through mid-October. Texas/Desert Rio Grapefruit will begin slowly in mid-October and ramp up as we head into December. Availability will be tighter in October for grapefruit and then open back up in late November/December. Things are continuing to remain tight on small Lemons (165 and up) and most shippers are continuing to hold to averages, with anticipation of better supplies in the next few weeks. Size structure is peaking at 140/115ct choice in District 3. Fruit is showing good internal quality with medium to large sizing. Picking is expected to ramp up gradually through September, with a peak anticipated in late October. District 1 preliminary evaluations are underway, with an early October start anticipated for the season. Imported product is due to wrap up in early October. California Mandarins are anticipated to start in November and California Cara Caras and Bloods will ramp up in December. The California Garlic crop is in full swing, 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 – **ESCALATED**
- Artichokes – **EXTREME**
- Blackberries – **ESCALATED**
- Bok Choy – **ESCALATED**
- Broccoli/Crowns – **ESCALATED**
- Broccoli Florets, Crowns and Asian Cut – **ESCALATED**
- Brussels Sprouts – **EXTREME**
- Celery/Celery Sleeved 36ct – **Escalated**
- Fennel, Anise – **EXTREME**
- Napa – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List









1. Blueberries
2. Broccolini
3. Cabbage
4. Cauliflower
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 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25
70° 59°F	70° 56°F	72° 57°F	75° 57°F	83° 62°F	75° 63°F	72° 60°F	72° 58°F
							
AM Showers	AM Clouds/PM	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny









OXNARD, CA

Thu 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25
72° 67°F	73° 63°F	74° 64°F	75° 66°F	77° 66°F	74° 65°F	75° 63°F	75° 63°F
							
AM Rain	AM Clouds/PM	AM Fog/PM	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny









FRESNO, CA

Thu 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25
84° 67°F	84° 66°F	89° 65°F	93° 66°F	95° 69°F	93° 67°F	88° 64°F	90° 64°F
							
PM Showers	Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny









HERMOSILLO, SONORA

Thu 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25
99° 81°F	99° 81°F	101° 82°F	103° 82°F	105° 82°F	108° 84°F	110° 85°F	102° 81°F
							
Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny	PM Thunderstorms









JALISCO, NAYARIT

Thu 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25
81° 67°F	81° 67°F	83° 68°F	84° 68°F	84° 68°F	84° 69°F	83° 67°F	80° 66°F
							
PM	Scattered	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms
Thunderstorms	Thunderstorms						









VIZCAINO, BAJA

Thu 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25
93° 74°F	93° 75°F	93° 76°F	93° 77°F	94° 77°F	96° 77°F	94° 76°F	91° 74°F
							
Scattered Thunderstorms	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	Partly Cloudy	Scattered Thunderstorms	Thunderstorms

LIBERTY, TN

Thu 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25
89° 59°F	90° 61°F	90° 66°F	88° 67°F	83° 65°F	82° 66°F	80° 63°F	78° 60°F
							
Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Scattered Thunderstorms	Isolated Thunderstorms

HENDERSONVILLE, NC

Thu 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25
81° 59°F	81° 60°F	80° 60°F	78° 58°F	78° 59°F	78° 61°F	76° 63°F	72° 60°F
							
Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	PM Showers	Showers

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: Markets have remained steady with good quality. U.S. avocado volume closed last week at 63.5M pounds, reflecting only a 2% change and extending the recent trend of stability. Beneath that steady total, regional shifts were more pronounced, with California up 18% while Peru declined 26%. Looking ahead, projections for the coming week are lighter due to Mexico's Independence Day holiday on September 16, when no harvesting occurred; however, the effect on overall U.S. volume should be minimal given the strong inventory position. Mexico has now completed its crop transition, with more than 99% of harvest activity coming from the Off-Bloom (Loca/Mendez) crop, which is averaging 26.3% dry matter and peaking on 48s. APEAM's updated forecast projects a 12% increase in total crop volume to approximately 2.9 billion pounds, potentially equaling or surpassing the record 2020–2021 season. In addition, APEAM continues to enforce dry matter standards, releasing fruit for harvest only once the crop reaches a minimum average of 23%. Approximately 5.8M pounds were harvested in week 37 from California, with dry matter averaging 31% and sizing peaking on 48s and 60s. The harvest volume has leveled off, but fruit quality remains excellent. At the current pace, California supply is expected to remain available through October. The 2025 Peruvian avocado season is approximately 97% complete, with U.S. arrivals projected to conclude within the next two weeks. Current programs remain focused on larger sizes as the season winds down.

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

Pineapples: WATCHLIST Pineapples will remain 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 peak production out of California. Quality and supply are stable on Flames, Sugraones and Ivory varieties.

Berries

Strawberries: Rainfall in Oxnard and Santa Maria today is expected to cause some short-term delays in harvest and loading, with quality likely to be affected by minor rain damage over the next couple of days. Conditions should stabilize quickly, as recent weather has been warm and projected rainfall totals were light. In Oxnard, volume continues to build with strong quality, full color, and counts in the low to mid-20s, supported by a 5-day forecast of daytime highs in the low 70s to low 80s and nighttime lows in the low to mid-60s. Watsonville volume remains strong with improved quality following recent warmth, and the 5-day outlook shows similar temperatures with cooler nights in the mid to upper 50s. Santa Maria production remains limited for now but is expected to gradually increase in the coming weeks.

Blackberries: ESCALATED Production is active in Central Mexico (CMEX), Oxnard, and Watsonville, though Oxnard has now finished while CMEX continues to ramp up weekly heading into the fall. Baja is scheduled to begin harvest in the second week of September, and Watsonville remains in production with twice-weekly harvests. Overall supplies have strengthened, but quality remains inconsistent across regions, with some reports of color reversion and softness.

Raspberries: Production is ongoing in Central Mexico (CMEX), Baja, Oxnard, and Watsonville, California, with all regions remaining steady and quality holding strong. Raspberry quality out of Watsonville is performing particularly well, with fruit showing excellent color, sweetness, and aroma.

Blueberries: WATCHLIST Production continues in Central Mexico (CMEX), but supplies are expected to tighten rapidly through September and October. With availability projected to be limited, prices are anticipated to rise in the weeks ahead.

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 start subbing sizes anytime soon for the larger side of the scale as old crop availability continues to decline. The short-term forecast is lighter supplies through September, 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: Lettuce quality is good, and supplies are improving. We are still seeing signs of INSV. There is also some light to moderate levels of sclero, fusarium and thrip damage. There have been lower yields from the smaller framed lettuce heads and increased disease pressure in the fields, but things are improving. The market is still active but for the time being, lettuce is looking good.

Iceberg VA: Quality and supplies look good.

Romaine & Romaine Hearts: Romaine and Romaine heart quality are okay, but supplies are light. The market is still trending higher due to increased demand. There have been some reports of fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Some growers are holding to averages. Organic Hearts are all still escalated.

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

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.

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

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

Mixed Chili Pepper: ESCALATED Supplies are tighter this week out of Mexico generally good across all categories due to a mix of heat and rain over the past several days. Red Fresno is the tightest this week and recommend subbing to red jalapeno when needed. California's quality is also compromised a bit by heat related pressure this week out of the central valley.

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: Light supply available this week. Quality is good.

Pickles: Light supply expected over the coming week out of Canada, 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 in Guatemala remains strong, though minor quality issues are being reported due to heat and ongoing shipping delays. Supply of French beans out of Mexico is fair, supporting overall market stability despite these challenges.

Zucchini/Yellow Squash: Lighter supply out of the west and we are transitioning in the east out of the local summer programs to South Georgia this week. Quality is good. New Crop Hard Squash is available for Fall promotions.

Herbs: WATCHLIST Basil production remains strong out of Colombia and Mexico, though some quality challenges have been noted due to heat in the fields. Tarragon volumes are expected to return to normal by the weekend, while imported chervil supply from Ecuador has improved.

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

Overview: Cooler temperatures as well as some scattered showers have slowed down production as we are past the peak in the California season. Regional melon deals are also starting to wind down pushing more demand west which will tighten overall availability over the coming weeks, however, expect no interruptions in supply through transition.

Cantaloupe: Cantaloupe pricing drifted down some as production increased over the past few days. The primary sizing over the past week has been reg 9/12s with even some 15s being packed. This sizing profile should continue for the next 7-10 days. Overall quality remains strong. Netting has been consistent, and the shell color remains high. Internal quality has been very good with higher brix levels, mostly 14-16%, and we have had excellent eating fruit.

Honeydew: Honeydew production has started to taper off and size distribution is leaning heavy to 6's; 8's are very limited. Quality is excellent; mostly clean shell, we are seeing occasional scarring on these first picks. Brix levels on the dewes are mostly in the 13-15% range.

Golden Honeydew: Done for the season.

Watermelon: Watermelon volume has started to firm up as local deals wind down for the season. Still seeing fruit available in several districts but that will gradually decline as the weather cools across the country and Fall approaches. Quality remains strong.

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: EXTREME Quality is good, but supplies are limited. Growers are holding to averages and there may be some substitutions on sizes.

Asparagus: ESCALATED Baja production has improved this week and is expected to continue strengthening over the next three to four weeks, with both sizing and quality showing better consistency. Peruvian volumes should begin to increase within the next 10–14 days, accompanied by improved sizing as supply builds. With greater availability from Mexico, market activity has eased compared to previous weeks.

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

Broccoli/Broccoli Crowns: ESCALATED Quality looks okay, and supplies are limited. Insect pressure (diamond back moth) is still affecting yields. The insect pressure has limited harvest. MX still has some supply issues. The market is still escalated. Some growers are already holding to 8 to 10-week averages. We have had reports of Browing, Pin Rot and Larvae from the insects. Organic Broccoli is still at the extreme trigger.

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

Brussels Sprouts: EXTREME Supplies are limited. We still have some growers struggling with yields and growers who pulled early from their fields to cover orders over the past few weeks are now having to wait for the new crops to catch up to demand. Insect pressure and internal browning continue to be reported but quality looks good. We are still seeing some elongated stems due to the rapid growth from the heat, but things are improving with the cooler weather moving in. The market is still at the extreme trigger. We should see supplies start to improve over the next few weeks but for now, grower are holding to averages.

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

Cauliflower: WATCHLIST Quality and supplies are good, but the market is firming up. The forecast is for the market to continue to edge up this week and next week. Organic Cauliflower is escalated.

Celery: 36ct ESCALATED Quality is great, but supplies have tightened up. As we head into the Fall pull, the market prices are trending upward. Demand has risen due to schools starting back up and with football season in full swing. Celery 36ct has already escalated and we may see the other sizes escalated soon also.

Corn, Sweet: Markets are mostly steady this week and we should see this continue through the remainder of the local seasons. 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: Leeks are no longer escalated, Quality and supplies look good.

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 are okay, and quality looks 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: Lighter volume available due to transitions and production forecasts that were made below actual demand. 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: WATCHLIST Quality looks good, but supplies are light.

Spinach: WATCHLIST Supplies are limited with some growers and quality is okay. We have seen some reports of weak texture, discoloration, wilting, moderate wind damage and there has been some insect damage. We have also recently seen heavy mechanical damage due to brittle texture. The 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 Supply and quality from Guatemala remain good for snow peas and sugar snaps, while Peruvian production is steady though quality is only fair. We are still seeing shipping delays continue to impact Guatemalan product, while warm weather and rainfall are further affecting production or quality. Domestic availability is limited and fair at best, contributing to continued higher pricing.

Onions:

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

Potatoes:

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

Tomatoes:

Tomato Suspension Agreement Update

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East Coast

- **Round and Roma Tomatoes:** Steady supply out of Alabama, North Carolina Virginia and Tennessee. Some of the upper Midwest/ Pennsylvania and Michigan growers are starting to slow down for the season. Current quality will be mixed but improving as growing conditions have improved over the past week. A track of drier weather has helped the crop along and daily puckouts seem to be more consistent.
- **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:** Volume is steady crossing through McAllen and Otay. We are keeping a close eye on weather in Southern California and Baja that may cause some production delays over the weekend but for the most part we feel markets will remain stable. Quality at all border crossings has been excellent.
- **Roma Tomatoes:** We are seeing slow demand and increased availability drive the market down this week. We are keeping a close eye on weather in Southern California and Baja that may cause some production delays over the weekend but for the most part we feel markets will remain stable. Quality at all border crossings has been 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:** Good supply crossing through McAllen and Otay. Quality is mostly good.
- **Tomato on the Vine:** Stable volume available this week.

California

- **Rounds and Romas:** We have entered the Fall cycle in production and volume is steady; we should see normal availability through the end of the season barring any unforeseen weather events. 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: Lighter supply out of Washington, New York and Canada.

Stone Fruit: New crop Peaches, Nectarines, Plums available out of the PNW. East coast supply will continue decreasing and wrap up very soon 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.