



Weekly Market Review September 25, 2025

Overview

Transition time is here! We are starting to see crops move south as summer comes to a close. Zucchini, Bell Pepper and Cucumber are ramping up in South Georgia. Out West, the first Squash trucks are crossing this weekend in Nogales. With respect to Tomatoes, we expect to see some new crop production in South Georgia over the next ten days; the mountain programs will start to wind down as summer closes. Romas will be the most active this week; rounds and snacking Tomatoes are flat. 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 are available! Following last week's holiday in Mexico, Avocado harvests have resumed in full, and supply remains steady across all sizes. Prices have firmed slightly due to stronger demand. Yet, conditions remain favorable for promotions, with ample volume available, particularly as the size curve peaks for large and jumbo fruit this fall. California's season is winding down with only limited harvests expected, while Peru is also nearing completion with final arrivals scheduled for early October. Mexican production is projected to increase through the fall, supporting steady availability at attractive prices, while APEAM's updated forecast calls for a 12% increase in total crop volume to approximately 2.9 billion pounds, potentially matching or surpassing the record 2020–2021 season alongside continued enforcement of minimum dry matter standards at 23%. In the East, vessel delays are disrupting the movement of Guatemalan products, while ongoing weather challenges in Guatemala are further pressuring production and quality. As a result, availability remains affected for Snow Peas, Sugar Snap Peas, Baby Peeled Carrots, Colored Baby Peeled Carrots, and French Beans. The temperature in Salinas has gotten hot! We have seen a significant change in the weather. The beginning of this week has been extremely hot, and we have seen increased humidity. Those high temperatures were also mixed with some rain so we can expect to see an impact on quality and supplies in the future. 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 have seen better quality over the past week but that is likely to change with the recent shift in the weather. Lettuce is on the watchlist for the next few weeks along with Romaine and Romaine Hearts. Romaine and Romaine Hearts are not currently escalated but again, the weather is likely to affect quality and supplies. Broccoli is still escalated, and we continue to see issues with supplies. There is still heavy insect pressure, and the warm weather has only increased that obstacle for growers. 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 still good, but supplies remain 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 also still at the extreme level. Supplies continue to be very tight. Artichokes also remain escalated to the extreme level. Sizing is small and growers are holding to 8 to 10-week averages. Bok Choy and Napa remain escalated. The new items added to the escalation list are Celery and Green Cabbage. We mentioned last week that the Celery market was on the rise, and it has finally hit the trigger point. With football season in full swing, we expect this item to stay escalated. Growers are seeing increased demand and decreased supplies. Cabbage supplies have also tightened up and that warmer weather will also affect this crop. The market is escalated for Cabbage and all shredded Cabbage items. 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 until we settle back into Yuma. 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, some suppliers are not anticipating a gap while transitioning to Navels, while others are expecting to gap in supplies. Please remain in close contact with your supplier on this matter and be sure to give ample lead time on orders so you can plan accordingly. 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/Asian Cut – **ESCALATED**
- Brussels Sprouts – **EXTREME**
- Cabbage, Green/Shredded – **ESCALATED**
- Celery/Celery Sleeved – **ESCALATED**
- Cilantro – **ESCALATED**
- Fennel, Anise – **EXTREME**
- Napa – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List









- | | |
|----------------------------------|---------------------------------|
| 1. Blueberries | 11. Ginger |
| 2. Broccoli | 12. Green Onions |
| 3. Cabbage | 13. Green Leaf & Red Leaf |
| 4. Cauliflower | 14. Romaine and Romaine Hearts |
| 5. French Beans | 15. Snow Peas & Sugar Snap Peas |
| 6. Herbs | 16. Spinach |
| 7. Iceberg | 17. Spring Mix |
| 8. Lemons, Small Sizes | |
| 9. Limes (Large Sizes are short) | |
| 10. Pineapple | |

Weather









SALINAS, CA

Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Mon 9/29	Tue 9/30	Wed 10/1	Thu 10/2
72° 57°F	72° 55°F	69° 58°F	67° 58°F	70° 58°F	69° 57°F	72° 55°F	72° 57°F
							
AM Clouds/PM	Partly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Cloudy	AM Showers	Partly Cloudy	Mostly Sunny









OXNARD, CA

Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Mon 9/29	Tue 9/30	Wed 10/1	Thu 10/2
69° 64°F	71° 64°F	69° 63°F	69° 63°F	70° 62°F	70° 61°F	72° 61°F	73° 62°F
							
Cloudy	AM Clouds/PM	AM Fog/PM	AM Clouds/PM	Partly Cloudy	AM Clouds/PM	Mostly Sunny	Sunny









FRESNO, CA

Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Mon 9/29	Tue 9/30	Wed 10/1	Thu 10/2
88° 62°F	89° 65°F	93° 64°F	85° 62°F	82° 61°F	79° 59°F	81° 58°F	84° 60°F
							
Partly Cloudy	Sunny	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Sunny	Sunny









HERMOSILLO, SONORA

Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Mon 9/29	Tue 9/30	Wed 10/1	Thu 10/2
104° 79°F	95° 75°F	91° 74°F	94° 73°F	99° 74°F	100° 75°F	101° 76°F	103° 78°F
							
Mostly Sunny	PM	AM	Partly Cloudy	Sunny	Sunny	Sunny	Sunny
	Thunderstorms	Thunderstorms					









JALISCO, NAYARIT

Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Mon 9/29	Tue 9/30	Wed 10/1	Thu 10/2
76° 65°F	76° 64°F	78° 65°F	81° 65°F	80° 66°F	80° 66°F	81° 67°F	82° 67°F
							
Heavy	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms
Thunderstorms							









VIZCAINO, BAJA

Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Mon 9/29	Tue 9/30	Wed 10/1	Thu 10/2
86° 74°F	85° 72°F	87° 73°F	92° 73°F	92° 74°F	91° 74°F	93° 74°F	94° 74°F
							
PM Thunderstorms	Scattered Thunderstorms	Thunderstorms	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	Partly Cloudy	Isolated Thunderstorms

LIBERTY, TN

Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Mon 9/29	Tue 9/30	Wed 10/1	Thu 10/2
79° 63°F	79° 58°F	79° 58°F	83° 59°F	85° 61°F	84° 60°F	82° 62°F	81° 59°F
							
AM Showers	Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

HENDERSONVILLE, NC

Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Mon 9/29	Tue 9/30	Wed 10/1	Thu 10/2
75° 64°F	75° 62°F	73° 60°F	75° 60°F	74° 60°F	76° 57°F	73° 55°F	68° 50°F
							
Scattered Thunderstorms	PM Showers	Scattered Thunderstorms	PM Showers	Few Showers	Partly Cloudy	Partly Cloudy	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, 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 remain steady with strong quality as U.S. avocado volume closed last week at 51.8M pounds, reflecting an 18% change from the prior week. Jalisco currently accounts for 15.6% of Mexico's shipments, with the Off-Bloom crop averaging 26.3% dry matter and peaking on 48s, while the Main Crop has begun, representing 3% of activity and showing a similar size curve. Harvesting resumed following the September 16 holiday, while Peru is nearly finished shipping to the U.S.; the remaining fruit is directed primarily to the EU. Colombia's principal crop is also largely bound for the EU, although U.S. arrivals are anticipated later in the fall. California harvested 4.3M pounds in week 38 with excellent quality, 31% dry matter, and sizing peaking on 48s and 60s, though volume is tapering off and minimal harvest is expected through October.

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 very short over the next 14 months at best due to low production in Central America brought on by drought, poor production and loss of acreage. Our contracts continue to maintain their integrity, however we will need to remain flexible regarding sizes to ensure the stability of the supply chain. Overall quality and taste are good.

Table Grapes: Now in peak production out of California. Quality and supply are stable on Flames, Sugraones and Ivory varieties.

Berries

Strawberries: Volumes remain steady even after rainfall over the past week. Volume in Oxnard continues to climb with strong quality, full color, and counts in the low to mid-20s. Over the next 10 days, Oxnard is expected to experience daytime highs in the low to mid-70s and nighttime lows in the mid-60s. In Watsonville, volumes are gradually tapering, although fruit quality has improved. Temperatures are expected to reach the mid-80s early in the week before cooling to the mid-70s, with nighttime lows in the upper 50s. Santa Maria volumes remain limited but are expected to gradually increase, with temperatures forecasted in the low 80s early in the week before easing to the mid-70s, and nighttime lows in the mid-to-upper 50s.

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 available 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: WATCHLIST Lettuce quality and supplies are good for right now. We are still seeing signs of INSV. With the recent hot weather and rain, we expect some production gaps over the next few weeks. The market is still active.

Iceberg VA: Quality and supplies look good, but the recent hot weather could affect things over the next few weeks.

Romaine & Romaine Hearts: WATCHLIST 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. INSV has increased due to the hot weather and supplies vary across the valley. 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:

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.*

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 Baja and Southern Mexico due to a mix of heat and rain over the past several days. Red Fresno and Tomatillo were the tightest this week and are recommending for Red Fresno consider a sub to red jalapeno when needed. California's quality is good for most items, however we will see lighter production due to weather this week.

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. Nogales is on the horizon. 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. Mexico should start ramping up over the coming weeks. Quality remains strong domestically and the fields in Mexico show good development to date.

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 remains steady, though minor quality issues are being reported due to heat, rain, and ongoing shipping delays. Supply of French beans from Mexico is fair, supporting overall market consistency 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. Sizing will be on the larger sizes as we scratch new fields. This should subside and we should see a more even distribution of sizes over the next ten days. Nogales will cross their first soft squash this week. Overall 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 heat-related quality issues are still being reported. Tarragon supply continues to improve, while imported chervil volumes from Ecuador have slowed due to weather conditions.

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: Strong cantaloupe production continues this week with the overall majority of what is being harvested are larger sizes. Still peaking on 9ct and 9Js leaving 12s in an extremely limited position. Yields have exceeded expectations, but the current sizing pattern will likely mean flexibility of sizing may be required. Overall quality remains at optimum levels – great size, good color and flavorful internal quality. Brix levels are maintaining a 12-14% range as we move into late-season production.

Honeydew: Honeydew production is not as strong as the cantaloupe, but the sizing pattern is similar on what is being harvested. We have been seeing primarily 5s and 5Js since the end of last week leaving 6ct very limited. Flexibility of sizing will likely be required in the short term. The long-term forecast for honeydew is questionable as the Mexican growing region of Hermosillo experienced substantial rains three weeks ago which will likely impact the start of that program which is scheduled to begin the second week of October.

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

Tomato Suspension Agreement Update

As we continue to navigate the impacts of the termination of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties are being imposed on Mexican tomatoes and will continue to see duties unless a new agreement is implemented. The cost breakdown of the current duties is available to you. Please contact your sales representative for details.

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 declined as fields transition from the north to the south, with Baja South opening earlier than planned following the recent tropical storm. Peruvian volume and sizing are beginning to improve, though overall markets remain active with reduced Mexican availability and Peru just starting to increase shipments. Delays are expected at the end of next week as mechanical issues with the shipping line slow Peruvian arrivals.

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 still limited. Insect pressure (diamond back moth) is still affecting yields. The insect pressure has limited harvest. MX still has some supply issues. The market remains escalated. Some growers are still holding to 8 to 10-week averages. We have had reports of Browning, 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: 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. All Celery is now escalated.

Corn, Sweet: Markets are getting firmer this week as later summer crops are winding down, with fall transitions on the horizon. Quality remains good but we will start to see some maturity issue as the crops wind down as we transition ear size and kernel size will decrease once we settle into the fall crops.

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: ESCALATED Supplies have tightened up, but quality still looks good. 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 as the summer production winds down; overall forecasts are below expectations and demand is higher. We are quickly approaching that time of year when holiday pull at retail makes supply very short. 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 from Guatemala has slowed due to weather, while Peruvian production remains steady with fair quality. Domestic availability is limited and only fair at best, keeping prices elevated across the market.

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

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:** Supply is good on rounds; we will start to see lighter volume on Romas over the coming week. Season will start to wind down over the next two weeks out of Alabama, North Carolina Virginia and Tennessee. We expect to transition to Florida at that point. Some of the upper Midwest/ Pennsylvania and Michigan will wrap up this week and be done for the season. Current quality will be mixed but improving as growing conditions have improved over the past week. We do expect some weather this weekend which could impact harvesting but don't expect more than minor delays.
- **Snacking Tomatoes (Cherry, Grape and Medley): AMPLE** supply available out of the summer programs, we are also transitioning to South Georgia and Florida over the next ten days. Quality is outstanding!

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:** Excellent 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 lighter. We are seeing some rain in the Central part of the state and expect to see some limitations to harvesting. We do expect 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.