



## Weekly Market Review December 11, 2025

### Overview

Production continues to be steady out of Florida and Mexico due to optimal growing conditions. Steady supply and excellent quality expected through Christmas. Grape season is taking a sharp turn as supplies dry up on storage fruit and what is left has questionable quality/shelf life. Import fruit is expected to start unloading by the first of the year. Green grapes are extremely short and will need to sub over to reds for the next 2-3 weeks. Cantaloupes quality is good with solid brix levels. Rain and colder temps have caused a smaller fruit profile and lower yields. Pineapple availability has improved some but remain limited; shippers are asking that we continue to be flexible on Pineapple sizes. Mexico had a 62.9-million-pound harvest last week with 56.9 million pounds coming to the US. Jalisco accounted for 13.2%. Avocado supply remains stable with good demand driven by retail promotion and lower than average pricing. Harvest volume is expected to be limited on Friday, in observance of the day of the Virgin of Guadalupe. 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 landing in the US. We have seen better strawberry production across the major growing regions, and quality has shown considerable improvement with more expected in the weeks ahead. Central Mexico is experiencing consistent weekly gains with strong early season quality. Baja has begun to advance as well, and production should continue to grow as we move into the new year. Florida is also improving steadily, and availability is expected to strengthen over the next five to seven days. In California, fields are transitioning from the summer planted fall crop to the fall planted spring crop, and early harvests are supporting a more stable winter supply. There are sunny skies in Yuma this week, with no rain in the forecast. Temperatures are warming up, but cool nights and early mornings are still slowing growth on several items. There have been some delays in harvesting in the morning due to frost. The growers are seeing light ice in the fields. Supplies of Broccoli, Baby Leaf/Tender Leaf, Cilantro, and Green Onions remain very tight. The recent weather events in Yuma continue to have a lasting impact on both quality and availability. While conditions are gradually improving, they are still far from ideal. Broccoli supplies remain constrained across many growers, who are reporting pin rot, water spotting, and smaller sizing. Growers will be holding closely to strict averages. Mann's Roma Crunch was heavily affected by the rain and is expected to remain severely short for the next two weeks. As a reminder, Ippolito will be covering approximately 50% of averages across all pack sizes for at least the next three weeks. They have no jumbo sprouts available—only medium and small sizes at this time. Other Brussels sprouts growers are also tight and adhering closely to averages where possible. Some prorating should be expected, though not as extreme as Ippolito's 50% reduction. Despite declining markets, quality and supply challenges will persist for certain items. The industry is now entering the weeks impacted by rained-out plantings, when two weeks' worth of seed and transplants had to be condensed into a 2–4-day window. With the increased planting during heavy rain, growers remain concerned about disease pressure. It is becoming evident across leafy items, and in the brassicas—particularly Broccoli—pin rot is especially prevalent. We will add Broccoli to the watchlist for this reason. Brussels Sprouts, Celery, Sugar Snap Peas, Snow Peas, Boston/Butter, Green Onions, Romaine and Romaine Hearts markets all remain at the extreme level. You will likely still see shortages on some of those items. Green Onions, Brussels Sprouts and Celery supplies remain extremely tight. Growers are holding to very strict averages when they can, but you will likely see prorates as we approach the holiday season. Both commodities are likely to continue to escalate. The market is at the extreme level and that is driven by low yields. Artichokes also remain escalated. Sizing is still small, and growers are holding strict averages. Anise/Fennel, Leeks and Napa all remain escalated. Growers are doing as much as they can to get out the best products that they can, but we will continue to see some quality and supply issues. We will keep an eye on the weather and continue to send out updates and information as we receive it. Cooler weather in the evening and mornings is moving in and while frost and ice are not currently a big problem, we will be keeping an eye on that and will keep everyone updated if any issues do arise. The Navel crop is beginning to tighten up on smaller sizes (138/113/88). If you can sub for larger sizes, those are more readily available. Choice grade is continuing to tighten up on all sizes as well. Lemons are readily available, peaking at 140ct. Some shippers are anticipating larger lemons becoming slightly more snug, so be aware! Grapefruit Red Rios are the main variety being packed. Crop is peaking in a 40/48 size structure. Some shippers are finishing up in California and only have product available in Texas, so stay in close contact with your suppliers on where they are loading their grapefruit. Mandarins are readily available and looking great! Please provide additional lead time on orders. Crop is peaking on 32/36. Caras have begun and are beginning to have more availability on all sizes. Bloods are beginning slowly. Anticipate pale coloring to start, and in January you will begin to see the more classic characteristics of blood oranges begin to show up. The California Garlic crop reports that supplies are steady but will continue to tighten as the year goes on. Maintain your averages to ensure product as the season continues.

### Alert List









- Asparagus – **ESCALATED**
- Artichokes – **ESCALATED**
- Boston/Butter Lettuce – **EXTREME**
- Brussels Sprouts – **EXTREME**
- Brussels Sprouts VA – **EXTREME**
- Celery/Celery Sleeved – **EXTREME**
- Fennel, Anise – **ESCALATED**
- Green Leaf – **ESCALATED**
- Hot Pepper: Poblano, Tomatillo, and Habanero – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce Iceberg – **ESCALATED**
- Lettuce VA Blends/Better Burger – **ESCALATED**
- Napa – **ESCALATED**
- Green Onions – **EXTREME**
- Red Leaf – **ESCALATED**
- Romaine/VA Blends – **EXTREME**
- Romaine Hearts – **EXTREME**
- Snow Peas & Sugar Snap Peas – **EXTREME**
- Strawberries – **ESCALATED**
- Table Grapes – **EXTREME**
- White Asparagus – **ESCALATED**

### Watch List









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

### Weather









#### YUMA, AZ

| Thu 12/11   | Fri 12/12   | Sat 12/13   | Sun 12/14   | Mon 12/15   | Tue 12/16   | Wed 12/17   | Thu 12/18   |
|---|---|---|---|---|---|---|---|
| 82°   55°F  | 82°   55°F  | 81°   56°F  | 81°   57°F  | 82°   54°F  | 81°   52°F  | 79°   53°F  | 79°   54°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Sunny   | Partly Cloudy   | Partly Cloudy   | Sunny   | Sunny   | Partly Cloudy   | Sunny   |









#### OXNARD, CA

| Thu 12/11   | Fri 12/12   | Sat 12/13   | Sun 12/14   | Mon 12/15   | Tue 12/16  | Wed 12/17   | Thu 12/18   |
|---|---|---|---|---|--|---|---|
| 73°   53°F  | 66°   52°F  | 65°   52°F  | 67°   52°F  | 71°   54°F  | 71°   54°F   | 69°   53°F  | 69°   53°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Partly Cloudy   | Mostly Cloudy   | Partly Cloudy   | Mostly Sunny  | Partly Cloudy  | Partly Cloudy   | Partly Cloudy   |









#### COACHELLA, CA

| Thu 12/11   | Fri 12/12   | Sat 12/13   | Sun 12/14   | Mon 12/15   | Tue 12/16   | Wed 12/17   | Thu 12/18   |
|---|---|---|---|---|---|---|---|
| 85°   51°F  | 85°   49°F  | 82°   56°F  | 84°   56°F  | 86°   57°F  | 84°   56°F  | 81°   55°F  | 81°   56°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Sunny   | Mostly Cloudy   | Mostly Sunny  | Sunny   | Mostly Sunny  | Partly Cloudy   | Mostly Sunny  |









#### HERMOSILLO, SONORA

| Thu 12/11   | Fri 12/12   | Sat 12/13   | Sun 12/14   | Mon 12/15   | Tue 12/16   | Wed 12/17   | Thu 12/18   |
|---|---|---|---|---|---|---|---|
| 88°   53°F  | 89°   56°F  | 90°   57°F  | 90°   59°F  | 89°   55°F  | 89°   55°F  | 89°   55°F  | 90°   56°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Sunny   | Mostly Sunny  | Partly Cloudy   | Partly Cloudy   | Sunny   | Sunny   | Mostly Sunny  |









#### JALISCO, NAYARIT

| Thu 12/11   | Fri 12/12   | Sat 12/13   | Sun 12/14   | Mon 12/15   | Tue 12/16   | Wed 12/17   | Thu 12/18   |
|---|---|---|---|---|---|---|---|
| 82°   58°F  | 81°   56°F  | 81°   56°F  | 83°   59°F  | 83°   58°F  | 81°   56°F  | 78°   55°F  | 77°   55°F  |
|  |  |  |  |  |  |  |  |
| Mostly Sunny  | Mostly Sunny  | Mostly Sunny  | Mostly Sunny  | Partly Cloudy   | Partly Cloudy   | Sunny   | Sunny   |

## VIZCAINO, BAJA

| Thu 12/11   | Fri 12/12   | Sat 12/13   | Sun 12/14   | Mon 12/15   | Tue 12/16  | Wed 12/17   | Thu 12/18   |
|---|---|---|---|---|--|---|---|
| 89°   53°F  | 89°   55°F  | 89°   57°F  | 89°   58°F  | 89°   58°F  | 89°   57°F   | 88°   56°F  | 86°   57°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Mostly Sunny  | Mostly Sunny  | Mostly Cloudy   | Partly Cloudy   | Mostly Sunny   | Mostly Sunny  | Mostly Sunny  |

## RUSKIN, FL

| Thu 12/11   | Fri 12/12   | Sat 12/13   | Sun 12/14   | Mon 12/15   | Tue 12/16  | Wed 12/17   | Thu 12/18   |
|---|---|---|---|---|--|---|---|
| 70°   45°F  | 75°   53°F  | 79°   59°F  | 79°   48°F  | 69°   49°F  | 73°   55°F   | 77°   59°F  | 80°   60°F  |
|  |  |  |  |  |  |  |  |
| Partly Cloudy   | Sunny   | Partly Cloudy   | Mostly Sunny  | Mostly Sunny  | Mostly Sunny   | 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, tariffs will be removed over the next two weeks, based on their arrivals 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 Columbia until trade new agreements are reached.

**Avocados:** Overall volume for the US remains stable. Sizing is still peaking on 48s and 60s and dry matter in the high 20s. Due to the rain during this time of the season, there is an increased presence of Lenticel. Lenticel are small brown spots that develop on the skin after harvest, especially during the rainy season. Lenticel has no effect on internal quality. The Main Crop now accounts for 87.2% of the total harvest volume.

**Bananas:** Banana supply remains stable and demand strong as we approach the holiday season. Overall, the banana quality was very good. We will see the removal of tariffs on these items over the next two weeks as we deplete inventory on hand and begin receiving product at the ports that will no longer have tariffs imposed on them. We will provide updates very soon on these rollout timelines.

**Pineapples: WATCHLIST** The Pineapple market has started to settle down some but remains tight. Demand remains high, keeping pricing stable. 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, the quality and taste are good.

**Table Grapes: EXTREME** Fall production is done out of California, and storage inventories are rapidly declining as we still see strong demand post-Thanksgiving and going into Christmas. Existing California fruit will see more prevalent quality issues such as high shatter, waterberry, possibly mold and nesting as well as depleted shelf life as the fruit continues to age. Green grapes are done and will need to sub to reds until consistent supply starts coming in from Chile and Peru. We do not expect significant volume and will see market volatility through the first of the year at the earliest; possibly the second week of January. We recommend scaling back portions until those markets ease back or consider making substitutions to alternate options such as cut fruit over the next two weeks.

## Berries

**Strawberries: ESCALATED** Supplies have increased considerably over the past week, and we are seeing good volumes out of most growing regions. Production from the summer-planted fall crop in Oxnard and Santa Maria is rapidly winding down. However, the fall-planted spring crop in Oxnard is beginning to come online and should help maintain a consistent supply through the winter months. Quality is showing strong recovery following recent rain events, and the forecast calls for continued favorable weather in the week ahead. Some inconsistency in color and size remains as the plants reset after the rainfall and necessary stripping. However, we anticipate steady improvement in quality with each successive harvest. Production in CMEX continues to increase each week, and early-season quality has been very good, with clean, well-presented packs. Baja is just beginning its season and will gain significance after the start of the new year as volume builds. Florida production is also increasing, although overall volume remains light, and is expected to become more meaningful within the next 5 to 7 days.

**Blackberries:** Production is ongoing in Central Mexico (CMEX) and Baja, and availability remains good. Overall quality is strong, although we are seeing some occurrences of softness and red cell or color reversion due to recent heat, rain, and elevated humidity in the growing regions.

**Raspberries:** Production is ongoing in Central Mexico (CMEX) and Baja with good availability. Overall quality remains strong, although some soft or overripe product is appearing due to recent heat, rain, and elevated humidity in the growing regions.

**Blueberries: WATCHLIST** Production remains active in Central Mexico (CMEX), and overall availability is strong. Quality and sizing out of Mexico have been very good, with consistent packs and strong field conditions.

## **Citrus**

**Limes: WATCHLIST** Supply is starting to shift heavy to larger fruit and quality will decline a tad as growers continue to harvest in older groves. Smaller sized fruit naturally is tighter and seeing continued upward pressure on the FOB prices. Long term we do expect some size and price vulnerability going into the New Year.

**Specialties:** Blood oranges and Cara Cara's are anticipated to begin in mid-December. When bloods begin in December, please be aware that the typical "blush" exterior may not be present, though internally you will find it! By mid-January, you will begin to see more of the typical exterior "blush" color on bloods.

## **West Coast Lettuce**

**Iceberg: ESCALATED** Lettuce quality is okay and supplies are good. Weights remain light. The market is still very active. The weather has affected both harvesting and quality, but things are improving. Growers are watching for soil borne diseases, and we get into the crops that were planted during the heavy rains.

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

**Romaine & Romaine Hearts: EXTREME** Romaine and Romaine Heart quality are okay, and supplies are good. There have been reports of bruising, mechanical damage, lightweights, fringe burns and light cupping. For the hearts, we are seeing very little heart material. The weather has affected harvesting and quality.

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

**Boston/Butter Lettuce: EXTREME** Quality is okay, but supplies are tight. We have seen mildew and fringe burn pressure. The weather has affected harvesting and quality.

**Green Leaf, Better Burger and Red Leaf: ESCALATED** Quality is good and supplies have improved. We have seen mildew and fringe burn pressure. We are still seeing lighter carton weights, but things are getting better. The weather has affected harvesting and quality.

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

**Green Bell Pepper:** Steady supply available from Coachella, Nogales, McAllen and South Florida. Quality is good. We do expect to wrap up out of Coachella next week and move completely to Nogales out west.

**Color Bell Pepper: WATCHLIST** Steady supply out of Coachella is winding down quickly and should completely transition to Nogales next week. We expect to see shortages in the east until Florida starts field grown reds. Quality is good.

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

**Mixed Chili Pepper: ESCALATED** Supplies will begin to increase through the month of December, which will improve quality as well as availability. We expect to see downward pressure on pricing as well. Growing conditions are optimal out of Sinaloa and Sonora. We will see escalated markets on Habanero, Poblano and Tomatillo.

**Eggplant:** Domestic supply is steady out of Florida while crossing through Nogales continue to be strong. Quality coming from both regions is very nice.

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

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

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

**Green Beans:** Holiday demand has been light and has put downward pressure on prices this week. Supply is steady out of Florida as they break new fields, and crossings continue to be steady through McAllen and Nogales. Overall, quality is good. We expect to see stable markets going into Christmas and New Years pull over the next week.

**French Beans: WATCHLIST** Production remains strong, and overall quality continues to show improvement. Mexico is providing a fair supply of French beans, supporting steady availability.

**Zucchini/Yellow Squash:** Supply stable and quality is good out of Florida as well as crossing through McAllen and Nogales.

**Herbs: WATCHLIST** Basil production remains strong from Colombia and Mexico, though some quality issues have been reported due to heat in the fields. Imported chervil supplies continue to be limited as weather in Ecuador impacts production. Overall, herb availability is steady with good quality, except for sage, which remains tight due to weather-related challenges. Quality across some items may continue to vary depending on field conditions.

| 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:** Guatemalan production has improved but remain limited on the larger sizes. Quality has been good with consistent high brix. Imported honeydew volume should increase over the next week, but Mexican honeydews saw delays due to strikes at the border.

**Cantaloupe:** We are starting to see the sizing profile shift to the 9/12s on the import. Overall, the fruit is strong, with solid netting, good internal quality and brix levels ranging from 12-14%. Shippers are anticipating overall production to improve over the next month or so.

**Honeydew:** Sizing is heavier on the 6 and 8ct out of both Mexico and Guatemala. Overall volume remains extremely limited. Scarring is a common characteristic at this time of the year, and mud/dirt will also be seen.

**Watermelon:** Domestic watermelons can be found on both coasts; however, there is an upward trend in prices due to a decrease in supply. The supply of Mexican watermelons via Texas and Nogales has been constrained due to production challenges stemming from rainfall experienced last month.

#### **Mixed Vegetables**

**Artichokes: ESCALATED** Quality is good, but supplies are limited. Growers are holding to averages, and there may be some substitutions on sizes. Large sizes are extremely tight.

**Asparagus: ESCALATED** Mexican production continues to strengthen. In Peru, volume is increasing in the northern Trujillo region, while the southern Ica region is slowing due to normal seasonal patterns, leading to a shift toward smaller, more standard sizes. Markets have become less active as greater availability of standard and small sizes from both Mexico and Peru enters the pipeline. We are 4-6 weeks away from the Peruvian season ending due to seasonality.

**Bok Choy:** Quality and supplies are good.

**Broccoli Florets/Broccoli Crowns: WATCHLIST** Quality is okay, but supplies are extremely limited with some growers. We have still had reports of Browning, Pin Rot and Larvae from the insects. Some growers are still prorating. Organic Broccoli is still at the Extreme Trigger. The weather has affected harvesting and quality. This is causing additional supply issues along with the cooler weather. Yields will continue to be challenging as we go into the holiday season.

**Broccolini and Sweet Baby Broccoli: WATCHLIST** Quality is good, and supplies have improved but are still limited with some growers. The weather has affected harvesting and quality, but things are improving.

**Brussels Sprouts: EXTREME** Supplies are extremely limited. Growers are struggling with yields. Insect pressure and internal browning continue to be reported, and quality just looks okay. The market is still at the extreme trigger. Severe prorates should be expected. Growers are covering 50% of weekly averages. Mid December is when we will see MX sprouts come into play so you should expect quality and supply issues until we reach Jan 2026.

**Carrots (JUMBOS, MEDIUMS and CELLOS):** Due to the excessive rain events in November, supplies are tight on Bay Carrots, Cellos and Jumbos. Availability will be limited. Rainbow Carrots remain steady and have great quality and supplies. 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. Rainfall has affected harvesting for some growers. Cello and Jumbo Carrots are the most heavily affected in all regions, and there will be limited availability until weather conditions improve.

**Cauliflower: WATCHLIST** Quality and supplies are good, but the cooler weather is affecting the growth so we may see some yield challenges.

**Celery: EXTREME** Quality is good, but supplies are extremely tight. The market prices continue to trend upward. Demand has risen due to the holidays and football season. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Corn, Sweet:** Lighter supply in the west while supply is steady out of Florida. We are in all new crop and quality is good.

**Fennel: ESCALATED** 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 are limited, and quality is okay. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Leeks: ESCALATED** Quality and supplies look okay.

**Garlic:** Quality remains good although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

**Ginger:** Supplies and market are steady.

**Green Cabbage:** Supplies are still tight, but they are improving. Quality is good. Some growers are still holding to averages. The weather is still affecting harvesting and quality. This could cause supply issues. Yields will continue to be challenging as we go into the holiday season.

**Green Onions: EXTREME** Supplies are very inconsistent. Quality looks okay. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

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

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

**Parsley (Italian & Curly):** Supplies and quality have both been affected by the recent rains. As with the baby leaf items, parsley was unable to be harvested, and growers will need to catch up on supplies. Prorates should be expected. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**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 still limited. We have still seen some reports of weak texture, discoloration and wilting. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Spring Mix:** Supplies on Spring Mix are limited this week. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Snow Peas and Sugar Snaps: EXTREME** Supply of Guatemalan snow peas and sugar snaps is improving. Peruvian production is at/near its end due to seasonality. Domestic supply of snow peas and sugar snaps remains limited, with prices elevated. Mexican production has recently begun, but volumes remain insufficient to meet market needs. Yields continue to be challenging, and most growers are only covering 50% of averages.

#### Onions:

The onion market is expected to remain stable throughout Q4. With harvest conclude, all products 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 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 Tomatoes:** Supply is plentiful on new crop rounds out of Ruskin and Palmetto, and seeing deals made across all sizes with lackluster demand going into the Thanksgiving Pull. Quality is outstanding.
- **Roma Tomatoes:** Supply is slowly improving this week as growers break new fields however still expect some volatility this week Overall quality is good out of Florida.
- **Snacking Tomatoes**
  - **Grape Medley:** Supply will remain tight over the next week; we hope to see more volume come on as the growing conditions continue to stay favorable.
  - **Grape Tomatoes:** Supply is steady and quality is good.
  - **Cherry Tomatoes:** Supply is steady and quality is good.

#### **Mexico**

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

#### Other Fruit:

**Apples:** **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:** Steady supply available out of California.

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

**Cherries:** Done for the season.

**Stone Fruit:** Done for the season.

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

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