



Weekly Market Review July 10, 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 will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.

We are going to be fighting some weather here in the Southeast, and we are seeing some delays in the regional transitions over the coming weeks. We are also watching a very active tropical pattern off the west coast of Mexico that will continue to bring cloudy weather, heavy rain and local flooding to the region over the next few weeks. This will impact harvest schedules and freight coming from Southern Mexico to the US Border. Jalisco, Baja and Monterey will all see stronger demand and lighter numbers this week, pushing prices higher across the entire category; Grape Tomatoes are particularly short this week, but quality remains strong across the entire category. In the East, Georgia is done and should see more volume transition to North Carolina and Tennessee later this week. California production on Tomato is strong; production on mixed dry veg will be challenging this week on both coasts due to transition. The tightest items are Green and Color Bell Pepper, Tomatillo, Habanero, and Jalapenos. The Mexican Table Grape season will wrap up over the next week or two; we will see domestic volume out of the desert continue while Arvin and Delano ramp up. Melons have fully transitioned to the Central Valley, and quality is outstanding. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. Banana supply will be volatile over the next several weeks due to a labor strike in Panama impacting the global supply chain. We do not expect major shortages at this time and are keeping a very close eye on this situation. New crop available out of California on yellow/white Peaches/Nectarines, Red/Black Plums and Apricots. There are also Peaches available in the East out of Georgia and South Carolina. Cherries out of Washington State. Mexico's current size curve remains misaligned with market demand, a trend that persisted from last week. Throughout the year, 60 ct fruit has effectively replaced 48 ct as the industry's preferred size as programs shifted downward. However, a recent shift in sizing has led to a 53% decline in shipments of 60 ct and smaller to the U.S. As is typical of the Loca crop, 2 grade fruit remains limited due to its off-bloom nature and smaller crop size, resulting in cleaner fruit and a lower proportion of seconds. Mexico is nearing the end of its Negra (old crop) season but continues to produce high dry matter fruit, much of it falling into Grade 2. The transition to the Flor Loca crop is expected by mid to late July due to the continued rainfall. We will see a noticeable shift in dry matter content, ripening behavior, and sizing. The oil content difference between the two crops—36% for Negra and 25% for Loca—marks the sharpest annual drop in Mexican avocado oil levels. California's season remains strong, with peak sizing on 48 ct. Although the volume is slightly down this week, the state's market share is expected to remain stable through August. Peru's season is in full swing, with significantly higher availability

than last year despite a reduced crop estimate. Consistent volumes are expected through summer. Colombia's Traviesa crop is entering its final stage, with volumes expected to decline over the next few weeks as the season concludes in August. Following the July 4th holiday, overall supply has remained steady, and demand remains strong. Prices for larger fruit have stabilized, while those for small and medium sizes continue to strengthen. Temperatures in Salinas have been cool near the coast the past few weeks and that has prompted a slow growth pattern. Warmer weather did roll in this week so we are hoping that will help with plant growth. But warmer weather does bring other challenges. We are expecting to see supply and quality issues arise. Insect pressure, specifically the diamondback moth, and INSV have been reported in the fields. Supplies have really tightened up on quite a few items. The Lettuce market has continued to rise. We are seeing lighter weights and lower yields, but quality still remains good at the moment. We expect to see the market continue to rise with demand increasing. Lettuce and VA Blends are all still escalated to the extreme level. Growers are doing their best to cover averages, but some outside labels are being used in order to fill orders at this time. You can expect to see prorates on Lettuce and Va Blends. The Romaine and Romaine Hearts market has also stayed escalated. Demand and lower yields are driving the market. Broccoli and Cauliflower supplies are also very light with the majority of growers. For Broccoli, the MX suppliers are extremely limited in supplies. Some growers do not have any supplies at all. MX does expect supplies to get a little better, but they do expect to have supply issues throughout the summer. Both Broccoli and Cauliflower remain escalated with the limited supplies driving the market. Broccoli is very tight across the industry. Quality still seems to be good but there have been reports of increased insect pressure on both items. Brussels Sprouts supplies are tight again. Some growers are losing yields due to quality. This is a tough time of year as Mexico is very hot, and some growers are winding down in Oxnard, so supplies are expected to be light for another week. Salinas has started up for some growers so supplies should start to improve but for now, the market is at the extreme level. Bok Choy, Napa, Endive, Escarole, Fennel and Leeks remain escalated. Navel season has officially ended, bringing Valencia's into full swing. With Valencia season underway and off to a strong start- the fruit's appearance is excellent, and the juice content is high. Sizing is peaking at 88s, followed by 113s. Initial harvests are yielding smaller fruit, with sizing expected to increase as the season progresses through the summer. With rising temperatures, demand for fresh lemons is increasing. Harvest and packing are in full swing in District 2, and both size and grade curves are tracking as expected for the region. As the summer progresses, volumes are expected to continue to decline as we move into August. District 2's season is anticipated to conclude around mid-September. Weather conditions remain favorable. 140/165/200 ct Lemons are looking extremely tight. Medium-to-large choice Lemons are more readily available as of now. Domestic supplies are tightening quickly. On the import front, availability is also limited. Argentina's shipments to the U.S. are down 77% year-over-year, with some growers reporting freeze damage; crop updates are expected next week. Despite the reduced volume, early quality reports from Argentina remain strong. Europe is paying top dollar for lemons out of Chile since the Turkish and Spanish crops are down, and Chile is favoring this market since it also avoids the tariffs. Size distribution out of Chile is expected to peak at 115s, 140s, and 165s, with approximately 75% to 85% of the crop anticipated to be Fancy grade. Overall volume is projected to increase by about 5% compared to last year, reaching an estimated 21–22 million boxes. Chile's vessels have also been delayed due to weather, further straining the import market. Mexico's crop is projected to begin mid-July, peaking small and reporting down roughly 60% YOY. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

Market Alert List

- **Avocados – ESCALATED**
- **Bananas – ESCALATED**
- **Bell Pepper- All Colors– EXTREME**
- **Bok Choy – ESCALATED**
- **Broccoli Crowns/Asian Cut/Org – ESCALATED**
- **Broccoli Florets – ESCALATED**
- **Brussel Sprouts – EXTREME**
- **Cauliflower/Florets – ESCALATED**
- **Endive and Escarole – ESCALATED**
- **Fennel, Anise – ESCALATED**
- **Garlic – ESCALATED**
- **Green Leaf/Green Leaf Singles/Filets – ESCALATED**

- *Hot Peppers (Jalapeno, Tomatillo, Poblano and Shishito) – ESCALATED*
- *Lettuce/VA Blends – EXTREME*
- *Leeks – ESCALATED*
- *Limes – ESCALATED ON LARGE SIZES*
- *Napa – ESCALATED*
- *Tomatoes, Grape – ESCALATED*
- *Romaine Hearts – ESCALATED*
- *Romaine/ VA Blends – ESCALATED*
- *White Asparagus*

Watch List

1. *Asparagus*
2. *Blueberries*
3. *Broccolini*
4. *Celery*
5. *Cilantro*
6. *French Beans*
7. *Herbs*
8. *Lemons – SMALL SIZES*
9. *Oranges – SMALL SIZE NAVELS*
10. *Pineapple*
11. *Ginger*
12. *Green Onions*
13. *Snow Peas & Sugar Snap Peas*
14. *Spinach*
16. *Dry Veg, Soft Squash, Slicer Cucumber*

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 will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.

Avocados: ESCALATED Overall supplies and markets remain steady. Last week, the U.S. avocado industry closed at 62.5M pounds, reflecting a 9% increase over the prior week. Markets continue to soften for larger fruit (48s and up), while smaller sizes remain relatively stable. In Mexico, ongoing rainfall is limiting Loca's availability, though harvest has begun. A significant volume of old crop Negra remains in the pipeline, and both crops are expected to overlap through August. The oil content difference between the two—36% for Negra and 25% for Loca—marks the sharpest annual drop in Mexican avocado oil levels. California harvested approximately 9.5M pounds in week 27, with dry matter averaging 27% and peak sizing on 48s and 60s. The Peruvian season is about 67% complete, with U.S. programs fully active and expected to continue throughout summer. Colombia's Traviesa crop is entering its latter phase, with sizing centered on medium fruit and dry matter ranging from 26% to 28%, supporting strong eating quality.

Bananas: ESCALATED Banana imports remain extremely light for the next 4 weeks. We continue to struggle with several recent challenges including record demand and overall lighter supply from the tropics. We are also seeing some logistical challenges due to the labor strikes in Panama that are impacting the global supply. Due to these challenges, we could see minor pro-rates across the network over the next four weeks. Overall, banana quality has been good and improving as we enter the summer grow cycle. Overall inventories are light, and we are seeing higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to keep a heavier than normal inventory on hand and self-manage color to protect from shorts.

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.

Table Grapes: The table grape transition continues; still loading in Nogales for another week, two tops, Coachella is wrapping up and Central Valley is awakening. Looks like we will have steady supply on Sugraones and Ivory Varieties out of Nogales and Central Valley this week; red varieties (Flames) are tight with Mexico winding down and should ramp up out of California this week. Markets are getting firmer this week but should improve next week. Quality is mixed, seeing more stressed fruit out of Mexico while California is strong.

Berries

Strawberries: Production across all districts—Santa Maria, Salinas, and Watsonville— remains lower due to cooler temperatures. The weather in Santa Maria has remained consistent over the past couple of weeks, with overcast and foggy mornings clearing to sunny afternoons, highs in the upper 60s to low 70s, and lows in the low 50s. These conditions are expected to continue for the next 3–5 days. Fruit quality is steady, though crews continue to cull small, overripe, and misshapen fruit. Labor remains stable but anxious due to increased immigration activity. The Santa Maria Fall Crop is progressing well, with strong plant vigor and uniformity, and initial harvests are expected by early August. However, soil-borne disease pressure is increasing in organic blocks. In Watsonville and Salinas, the weather has been slightly warmer than normal, with steady daytime highs in the upper 60s and recent morning lows climbing into the high 50s. There was a brief warm-up early in the week, with highs near 74°F before returning to the low 70s. Fruit quality remains strong, though there's been a recent uptick in soft and dark fruit in certain varieties, likely tied to the warmer conditions. Counts have been consistent, ranging from 14 to 24 for conventional varieties and 20 to 26 for organic varieties. Labor availability is excellent, with many workers seeking employment with local growers, which helps maintain a consistent harvest pace.

Blackberries: Blackberry production in Mexico continues to be impacted by ongoing rain, though conditions are slightly more stable than those affecting raspberries. To date, conventional volume targets have been met; however, the situation remains fragile. A significant portion of the current supply is sourced from a limited number of strong-performing growers, and if these growers encounter challenges, the volume could drop by a substantial amount. Quality concerns, including issues in the cooler and upon arrival, remain top of mind. To mitigate risks, growers are focusing on field cleanup, pruning, and, in some cases, harvesting entire fields for the frozen market to maintain quality standards. Organic blackberry production is facing similar challenges. In Watsonville, blackberry production is steadily ramping up, with peak volume expected in mid-August. The fall crop is showing strong potential based on bloom development and current field conditions. The quality has been excellent overall, with only minor issues noted in substrate-grown fruit. Supply is expected to remain strong through July and August, aligning with the ramp-up of Mexico's fall crop and new plantings in early September. Organic production has also been consistent, meeting volume expectations with slightly smaller berry size compared to conventional fruit. Meanwhile, Central Valley production is in full swing but slightly below expectations. Last week's volume came in at about 50% of the forecast, though improvement is expected this week and next, which should represent the seasonal peak. Quality has ranged from good to fair, with some wet and leaky berries, particularly in the Vaughn variety. Despite minor setbacks, Central Valley remains a reliable contributor to the overall supply, helping support the program as Mexican production winds down.

Raspberries: Raspberry production in Mexico continues to struggle under persistent rainy conditions affecting all growing regions. Night and afternoon rains have raised humidity levels and limited field access in the mornings, restricting harvests and resulting in increased fruit waste, either through discard or diversion to the frozen market. As a result, volumes are down considerably this week, with similar shortfalls expected over the next two weeks if the weather does not improve. Quality issues such as mold and leaky berries have become more frequent upon arrival at domestic coolers. Growers are actively working to clean fields, remove compromised fruit, and, in some cases, harvest entire blocks for freezing to preserve quality. Some are also required to begin pruning if improvement is not seen. Organic raspberry production is facing the same weather-related challenges. There is potential for a gap in organic availability through July until organic fall crop production begins in August. In contrast, Watsonville raspberry production is ramping up steadily. Warmer weather is supporting strong performance from the spring crop, with slightly higher volumes expected this week. A particular variety is projected to drive a significant increase in supply from mid-July through early August. Quality remains excellent, and the region is well-positioned to provide consistent raspberry volume through August and September.

Blueberries: WATCHLIST Mexico's blueberry season is effectively over, as persistent rainfall over the past two weeks has led to the early termination of the remaining fields due to quality concerns, including smaller fruit size and inconsistency. No additional volume is expected from this region until newly planted fields begin producing later this fall. In California, the Central Valley season is coming to a close, with packing operations expected to wrap up by the end of this week. Attention now shifts to the Pacific Northwest, where the season is gaining momentum. Growers across Oregon, Washington, and British Columbia have completed their first Duke picks and are transitioning into Draper. Recently cooler weather, following a brief heatwave, has created optimal harvest conditions. Fruit quality remains excellent, with hand-harvested blueberries showing strong size and flavor, and machine-harvested fruit grading out well. Organic harvests are also underway. In Eastern Washington, growers are enjoying a strong start to the season, with stabilized weather and no rain in the forecast, minimizing mold risk. Western Washington growers are preparing to begin harvest next week under favorable coastal conditions. In British Columbia, most growers are about a week out from the start of the duke harvest. Fruit quality appears promising, with good sugar levels and medium to large size; however, the berries still need to gain a bit more weight. With hot weather behind them and optimism growing, daily harvest volumes are expected to begin mid-next week. Overall, the Pacific Northwest is entering peak season with strong availability and excellent quality expected throughout July.

Citrus

Oranges: Navel season has officially ended, bringing Valencia's into full swing. With Valencia season underway and off to a strong start-the fruit's appearance is excellent, and the juice content is high. Sizing is peaking at 88s, followed by 113s. However, early estimates indicate a lighter overall crop volume this year. Initial harvests are yielding smaller fruit, with sizing expected to increase as the season progresses through the summer.

Lemons: WATCHLIST ON SMALL SIZES. With rising temperatures, demand for fresh lemons is increasing. Harvest and packing are in full swing in District 2, and both size and grade curves are tracking as expected for the region. District 2 is officially the only growing region, as District 1 is fully wrapped up. District 2's season is anticipated to conclude around mid-September. Weather conditions remain favorable. 140/165/200 ct lemons are looking extremely tight. Medium to large choice lemons are more readily available as of now. Domestic supplies are tightening quickly. On the import front, availability is also limited. Argentina's shipments to the U.S. are down 77% year-over-year, with some growers reporting freeze damage; crop updates are expected next week. Despite the reduced volume, early quality reports from Argentina remain strong. Europe is paying top dollar for lemons out of Chile since the Turkish and Spanish crops are down, and Chile is favoring this market since it also avoids the tariffs. Size distribution out of Chile is expected to peak at 115s, 140s, and 165s, with approximately 75% to 85% of the crop anticipated to be Fancy grade. Overall volume is projected to increase by about 5% compared to last year, reaching an estimated 21-22 million boxes. Chile's vessels have also been delayed due to weather, further straining the import market. Mexico's crop is projected to begin mid-July, peaking small and reporting down roughly 60% YOY. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

Limes: ESCALATED ON LARGE SIZES We are starting to see supplies improve slightly on 175's while 110's and 150's remain snug. We will need to sub to 175's this week on orders calling for 150's and larger. Good supplies on smaller-sized fruit (200's, 230's and 250's). Quality is improving.

Imports/Specialties: Blood Oranges will be finishing for the season in the next few weeks. Sizing is running small. Grapefruit is available with light supplies on Fancy grade; choice grade is available. Cara's, Minneolas and Mandarins are all but finished for the season.

West Coast Lettuce

Iceberg: EXTREME Lettuce quality looks good, but supplies have gotten tight. We are seeing lighter weights and increased demand. There have been some reports of INSV, but they have been minimal so far. The market has continued to escalate and will probably continue to do so until supplies improve. Recent harsh weather in MX has increased demand on the CA supply and is putting unexpected pressure on the Salinas region. Growers are holding to averages. **Iceberg VA: ESCALATED** Quality looks good, but supplies have tightened up. Growers are holding to averages when they can, but you can expect some prorates.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine heart quality are good, but supplies are tight. There have been some reports of fringe burns and light cupping. Insect pressure is being reported. We have also had some initial reports of small amounts of INSV and sclerotinia in some of the romaine fields. The market is trending higher. Romaine, VA Blends and Romaine Hearts are all escalated. **Romaine VA: ESCALATED** Quality and supplies are good, but we are keeping an eye on insect pressure and the weather.

Green Leaf ESCALATED and Red Leaf: Quality is good, but supplies are a bit light. We have seen mildew and fringe burn pressure.

Green Leaf and Green Leaf Singles/Filets ESCALATED Light supplies are expected for the next few weeks.

Eastern and Western Vegetables:

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Green Bell Pepper: EXTREME Lighter supply and higher demand this week. In the west Bakerfield is about done while the coastal plantings are slowly ramping up. We hope to see some relief in the west this coming week. In the east rain has delayed the crops and it looks like several regions are about 10 days behind. The quality is good but supply will be short enough that scaling back portions may be necessary this week and next.

Color Bell Pepper: EXTREME High demand and very short supply out of the east and west coasts has driven markets to record highs this week. Canada remains steady on 11# all sizes but prices are up. Transitions and rain delays domestically have caused these shortages. Quality is mixed...you will see a lot of greener skinned fruit this week and next, but overall quality will be fair. We expect to see short markets over the next 10-14 days...we recommend scaling back portions if necessary while we navigate these shortages.

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

Mixed Chili Pepper: WATCHLIST Supplies in general are fair across most varieties out of Mainland Mexico and Baja this week. Supply will slowly improve just as quality with the additional volume. Jalapeño, Poblano and Tomatillo were lighter this week. Shishito will be the shortest and could see some supply interruptions. Fresno hot pepper is slowing ramping up, seeing some Poblano and Jalapeno this week while in the east we will transition out of South Georgia to the Carolinas. Quality is fair at best across the entire category.

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

Slicer Cucumbers: WATCHLIST Stable supply crossing through Otay and McAllen. Domestic supply out of North Carolina and Tennessee is slowly improving. Georgia is done for the summer. Quality is outstanding in the west and fair in the east.

English Cucumbers: Good supply available this week. Quality is good.

Pickles: Light supply expected over the coming week out of South Georgia and should then transition to the Carolinas as well as Michigan.

Green Beans: WATCHLIST Supply and quality will be mixed this week as most growing regions deal with weather-related pressure. mixed.

French Beans: WATCHLIST Production has increased; however, quality and shelf life have been impacted by recent rainfall and ongoing shipping delays out of Guatemala. Meanwhile, there is a fair supply of French beans currently available out of Mexico.

Zucchini/Yellow Squash: WATCHLIST Lighter volume out of South Georgia as the season closes. We should be transitioning to the Carolinas and Tennessee over the next week; markets were higher. In the west we now in Full production out of Fresno and Baja with some lingering production out of Sonora. Quality is mixed.

Herbs: WATCHLIST

In the East, **basil** quality continues to be impacted by persistent rain in Colombia. Imported chervil has begun arriving from Ecuador, though volume remains extremely limited. Out of the West, **basil** supply and quality are strong. Supplies of other herbs remain steady, with the exception of chervil, which continues to face weather-related challenges that may persist in the fall.

Melons

Cantaloupe: We have completely transitioned to the central valley this week and loading fruit out of Huron! Fruit quality is outstanding; we are seeing good shell and internal color in the fields; brix levels mostly in the 14-16% range consistently. Sizing on the front end of these fields will lean heavy on Jumbo 9's and 9's will some 12's mixed in; this should even out over the coming days as our growers manage the crop and production becomes more consistent. Good supply on Athenas out of South Georgia.

Honeydew: Honeydew production has started off strong and is coming in heavy on 5's this week. Both Cantaloupe and Dews will need to be flexible on sizing this week. Quality is good; mostly clean shells, we are seeing occasional scarring on these first picks. Brix levels on the dews are mostly in the 14-16% range.

Watermelon: Watermelon volume is very good out of California, Arizona, Texas, and the Carolinas. Quality is outstanding.

Mixed Vegetables

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Artichokes: Quality and Supply are good.

Asparagus: WATCHLIST Baja production continues to be steady. Guanajuato production has decreased due to rain in the growing region. Peruvian volume continues to increase, but mostly on the smaller sizes. Markets have slowed down because of the holiday and more Peruvian product available.

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

Broccoli/Broccoli Crowns: ESCALATED Quality is still good, but supplies have tightened up with the majority of the growers. Demand is increasing and insect pressure (diamond back moth) has been reported and is affecting yields. MX has had severe weather and increased insect pressure resulting in extreme shortages. The market is escalating. Growers are holding to averages. Organic Broccoli is at the Extreme Trigger.

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

Brussels Sprouts: ESCALATED Supplies are tight. Growers are holding to averages. One of the largest suppliers has wrapped up harvesting in Oxnard and MX. They are relying on Salinas to harvest 100% right now. We can expect to see light supplies for the next few weeks until they get settled in Salinas and get the volume they need.

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

Cauliflower: ESCALATED Quality is good, but supplies are light with some growers. We are also seeing insect pressure, a little discoloration and creamy color.

Celery: WATCHLIST Quality and supplies are good right now. Organic celery and prices are tightening as we get into summer.

Corn: Sweet: Markets firmed up this week as Georgia closes for the summer and we start the transition north. In the west, Tracy and Brentwood are now in full production. We should see some improvement in supply and markets over the next ten days. 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.

Kale: Supplies have improved, and quality is good.

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

Garlic: ESCALATED The 2024-2025 California Garlic season is ending and as is sometimes the case during the transition from old crop to new crop garlic, there is a supply gap before the new California harvest begins. Growers are currently supplementing with product from Mexico to Bridge the Gap until new crop California Garlic gets started the first week of August. Quality remains good although available supplies will be decreasing, **PRICING WILL BE ESCALATED! "**

Ginger: Supplies and markets are steady.

Green Cabbage: Supplies and quality look good.

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

Mushrooms: Promotable volume available and quality is good.

Napa Cabbage: ESCALATED- Quality and supplies are improving but there is some insect pressure.

Parsley (Italian & Curly): ESCALATED 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 and supplies are good.

Spinach: WATCHLIST Supplies are limited to some growers and quality is good. We have seen some reports of weak texture, discoloration, wilting and there has been some insect damage, but it is all minimal right now.

Snow Peas and Sugar Snaps: WATCHLIST Snow pea and sugar snap production out of Guatemala is down due to ongoing rain, with most growers pausing shipments due to compromised quality. However, limited availability of Guatemalan snow peas may resume next week. Peruvian production remains steady. Meanwhile, Mexican production has concluded for the season, and domestic supply will be limited for the next one to two weeks.

Onions:

The onion market is not expected to see significant movement during Q3. Ample supply from California and New Mexico is anticipated to carry through the first half of the quarter, while the Northwest is projected to have a strong crop this season. The latter half of Q3 will largely be a "harvest market," meaning onions will need to ship fresh air and cannot be stored, regardless of market conditions. Looking ahead, the long-term outlook for the Northwest is less favorable going into next year, despite expectations for similar or increased acreage compared to last season. Barring any major weather disruptions, the industry should have more than enough supply to meet and exceed demand across all colors and sizes for the remainder of the calendar year.

Potatoes:

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

Tomatoes:

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Suspension Agreement Update: At this time there are no major developments to report and the Suspension Agreement between the United States and Mexico is scheduled to terminate on Monday July 14, 2025, leaving all tomatoes imported from Mexico exposed to 20.9% duties. We are keeping a close eye on the developments, and should there be any updates we will communicate them promptly.

East Coast

- **Round and Roma Tomatoes:** The season is now done out of Georgia and moving to North Carolina and Tennessee where production is slowly ramping up. Current quality will be mixed due to the weather but should improve with each harvest. Rounds volume should improve towards the end of next week while Romas are short, overall volume should improve over the next 10 to 12 days.
- **Snacking Tomatoes (Cherry, Grape and Medley): ESCALATED** Lighter supply available due to the rain, quality remains good.

Mexico

- **Round Tomatoes:** Production was down slightly due to clouds and rain out of Jalisco but should improve once the weather clears. Baja volume remains steady; overall demand stays light this week on rounds despite seeing excellent quality.
- **Roma Tomatoes:** Production was down this week in Jalisco, San Luis Potosi due to weather and demand was higher this week on the National Market as well as here domestically. Baja is also down this week as the southern region winds down and production moves to more mild country in Northern Baja. Pricing was a bit higher this week on the spot but expected to fall back by the middle of next week. The quality remains good.
- **Snacking Tomatoes**
- **Grape Tomatoes: ESCALATED:** Lighter supply from the mainland mostly due to weather. Most of the volume seems to be coming from the Baja; quality is very good. Markets are higher this week due to the lighter supply out of the east as well as mainland Mexico.

- **Cherry Tomatoes:** Most of the volume seems to be crossing from the Baja; quality is very good. Demand is flat.
- **Medley Mixed Tomatoes:** Lighter volume this week available through McAllen and Otay. Quality is mostly good.
- **Tomato on the Vine:** Stable volume available this week.

California

- Strong production out of the valley should continue for the month of July. Rounds are plentiful, Romas were short this week due to higher demand and priced much higher. The overall quality is good.

Other Fruit:

Apples: **Red Delicious** apples have good availability across all sizes and grades, with a steady market expected to carry through until the new crop begins around the second week of September. **Golden Delicious** supplies remain available in most sizes and grades, though some growers are nearing the end of their season. Availability should continue for another month or two, though tightening supply may lead to firmer pricing. **Gala** apples show strong availability across all sizes and grades, with the market holding steady and supply projected to last until new crop harvest in mid-August. **Fuji** remains well supplied in larger sizes and higher grades, with steady markets expected through September. **Pink Lady** apples are solid in both supply and quality, though a brief gap may occur prior to the new crop harvest in October. **Honeycrisp** is experiencing a 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: Season is done and has transitioned to Washington.

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

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

Quince: Limited supply available this week.