



Weekly Market Review August 1, 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.

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, as growers were notified just Monday evening of the duties being retroactive. 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.

Post Suspension agreement demand has been decent domestically as well as for Mexico going into the weekend. There is a lot of uncertainty about the cost impacts since the termination of the agreement, at both retail and foodservice. Grape Tomato supply started to improve this week; large rounds remain tight this week while smaller sizes remain in good supply. Romas were firm this week, but supply stayed steady despite the higher demand. Quality across the entire category out of Mexico is excellent while domestic fruit was fair out of North Carolina and Tennessee. California production on tomatoes is strong; production on mixed dry veg will be challenging this week on both coasts due to transition. The tightest items continue to be Green and Color Bell Pepper and Red Fresno and Tomatillo. Grape season is well underway in California; quality and supply are excellent, and we should see steady markets now through late October. Melon supply out of Firebaugh is steady and quality is outstanding. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. 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 with Cherries out of Washington State. Overall, avocado market conditions remain mostly steady, as the industry maintains strong inventory levels across all current countries of origin. However, Mexican harvests are lighter this week due to higher inventory levels and industry uncertainty due to the tariff scare. There is an ample supply of large, medium, and small fruit. California production is steady but will start to taper down gradually as the region enters the latter part of its season, with harvests expected through September. Peru imports are strong, with great availability on large and jumbo fruit. This is a great time to promote across all sizes and countries of origin. Temperatures in Salinas continue to be on the cooler side but it looks like a heat wave maybe on the horizon. We have continued to see some supply and quality issues arise. Insect pressure and INSV have been reported in the fields. Supplies continue to be light for a few items, and the lettuce market is

once again rising. Supplies are still limited with some growers. We are still seeing lighter weights and lower yields due to smaller heads and increased insect pressure. Growers are doing their best to cover averages, but some outside labels are still being used to fill orders. You can still expect to see growers holding to averages on Lettuce and VA Blends until supplies are ample again and we see some. Romaine Hearts are also once again escalated with some growers. Fringe burn and INSV are present in some fields. Broccoli supplies have improved with the CA growers but we seeing heavy insect pressure, and the markets could start to react. MX growers still expect supply issues throughout the summer. Quality still seems to be good but there have been reports of increased insect pressure. Brussel Sprouts supplies are still very tight. Some growers are losing yields due to quality. Salinas has started up for some growers so supplies should start to improve but for now, the market is still at the extreme level. Growers are holding to 10-week averages when they can, but we are still seeing prorates. Bok Choy, Napa, Endive, Escarole and Leeks remain escalated. Fennel supplies have gotten light, and we have started to see prorates from a few growers. The Fennel market is now at the extreme level. While supplies are starting to improve on some items, we will still have some supply gaps as we continue into the summer. Valencia orange's appearance is excellent, and the juice content is high. Sizing is peaking at 88s, followed by 113s. Some growers are seeing some regreening on the oranges, causing extended gas times. With the gas time varying, please give as much lead time as possible. Choice grapefruit is readily available, but most growers are requiring ample lead time for Fancy grapefruits. With rising temperatures, demand for fresh lemons is increasing. As we push towards the end of District 2's season, things are continuing to remain tight on small lemons. Size structure is peaking at 140/115ct choice. 140/165/200ct Lemons are remaining extremely tight and are projected to remain tight through October. Fancy grade percentage is down this season due to high wind events, which have impacted fruit quality. 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. District 3 is projected to begin in approximately 6 weeks. Growers continue to evaluate fruit across District 3 and are seeing volume fluctuations between regions. Early indicators point to a smaller overall crop this season, though fruit sizing has improved compared to last year. Please note that there is a global strain on lemons. In Mexico, early picks are expected to begin within the next two to three weeks, with initial crossings anticipated in early to mid-August. While the fruit is still maturing, sizing is trending toward 140s, 165s, and 200s, with grade leaning more toward Choice. Argentina continues to ship significant volumes to Europe and Russia, with 4.5 million cases sent to Europe so far, which is a 71% increase over the total volume shipped to that market in 2024. Peak sizes range between 95s, 115s, and 140s. While overall fruit quality is improved compared to last season, it still varies by supplier. We anticipate shipments to the U.S. to continue through mid-August. At this point, Argentina is approximately 70% through its crop. Chile has shipped close to 1,200,000 boxes to the USA. Pack outs have been predominately 115s, 140s, and 165s, with approximately 70-80% of the crop being Fancy. Overall volume is projected to increase by about 5% compared to last year, reaching an estimated 21–22 million boxes. In the recent weeks they have increased shipments to an average of 175k cases per week into the United States, with 70% of the volume headed to the East Coast. That volume is expected to remain the same as Chile is shipping a considerable volume to other markets such as Asia and Europe. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

Market Alert List

- **Asparagus – EXTREME**
- **Bell Pepper, All Colors – EXTREME**
- **Bok Choy – ESCALATED**
- **Brussel Sprouts – EXTREME**
- **Endive and Escarole – ESCALATED**
- **Fennel, Anise – EXTREME**
- **Garlic – ESCALATED**
- **Hot Peppers (Tomatillo and Red Fresno) – ESCALATED**
- **Leeks – ESCALATED**
- **Lettuce/VA Lettuce – ESCALATED**
- **Napa – ESCALATED**
- **Romaine Hearts – ESCALATED**
- **Sweet Corn – ESCALATED**
- **White Asparagus – ESCALATED**

Watch List

1. Avocados
2. Blackberries
3. Broccolini
4. Broccoli
5. Cilantro
6. French Beans
7. Herbs
8. Lemons, Small Sizes
9. Pineapple
10. Ginger
11. Green Onions
12. Snow Peas & Sugar Snap Peas
13. Spinach
14. Spring Mix

Fruits & Vegetables

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Avocados: WATCHLIST Due to industry uncertainty and strong inventory, the industry slowed harvest this week. Crop transition continues, with current harvest activity consisting of approximately 80% Off-Bloom and 20% Main Bloom. Last week closed at 58.7M pounds for the U.S. avocado industry, a 15% decline from the previous week. Jalisco currently accounts for 15.5% of Mexico's shipments to the U.S. The Main Crop is nearing completion, continuing to show Category 2 availability, with dry matter averaging 38%. The Off-Bloom (Loca/Mendez) crop is gaining momentum, with a clean profile and a typical size curve peaking on 48s and 60s. Dry matter is averaging 24% on Off-Bloom fruit. The following two weeks' actuals will differ from projections as the industry manages through another potential tariff implementation from Mexico. Approximately 8.8M pounds were harvested in week 30 in California. Dry matter is averaging 28%. Sizing continues to peak on 48s and 60s. Harvest volume has tapered from seasonal highs in April and May, with gradual weekly reductions expected through August. Quality remains excellent, and California fruit is anticipated to remain available through early fall. Colombia's Traviesa Crop is nearing the end of its season, with approximately 3-4 weeks of volume remaining before transitioning to the new crop. Dry matter ranges between 26-27% depending on the region, and sizing remains focused on medium to small fruit. The next harvest is expected to begin in late August or early September from lower altitude growing regions. The 2025 Peruvian avocado campaign is now roughly 87% complete, with more than 569,000 metric tons shipped globally. Volume continues to arrive in good quality with dry matter around 25%. ProHass projects total avocado volume for 2025 to reach 651,908 metric tons.

Bananas: Banana supply remains stable at this point in the summer but will most likely tighten back up once school starts back up for the fall. Overall, banana quality has been very good. We will continue to advise distributors and customers to keep a close eye on ripeness throughout the summer months; warm weather can lead to fruit ripeness running away from you. Proper storage temps and sufficient air flow where product is being stored is critical during these warmer months.

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: Now in full production out of California; quality and supply are stable on Flames, Sugraones and Ivory varieties. We should continue to see improvements over the next several weeks.

Berries

Strawberries: Production is slowing across all key growing regions, including Santa Maria, Salinas, and Watsonville, as the season moves past its peak. Volumes are expected to continue declining through July and August before fall production ramps up out of Santa Maria and Oxnard. Overall quality remains strong, though wet and foggy mornings have led to increased reports of bruising and decay. QA teams are actively sorting out affected products to maintain a premium pack. Fruit continues to show full color, medium to large sizing, and strong eating quality.

Blackberries: **WATCHLIST** Production is currently active in Central Mexico, Baja, and Oxnard. Hot and humid weather across the Midwest and east coast is causing challenges for southeastern and northeastern crops. Quality in Mexico has been fair to good, with some reports of soft berries and color reversion. Oxnard fruit is performing better but has very limited volume. We're monitoring quality across all regions. Supplies and availability will remain very tight over the next few weeks.

Raspberries: Active production continues in Central Mexico, Baja, and Watsonville, with steady supplies and consistent availability. Quality remains excellent, highlighted by sweet, aromatic berries with strong flavor and full color. Fruit is performing exceptionally well, supporting strong market demand.

Blueberries: Production is active in Central Mexico, Oregon, and New Jersey. Central Mexico volume remains low but consistent. New Jersey is improving after a slow start caused by heat, humidity, and labor shortages. Oregon is ramping up and coming into peak production, with strong volume expected through late July. Overall supply is steady, and availability is good.

Citrus

Lemons: **WATCHLIST ON SMALL SIZES** (165's and below) Lemons look extremely tight as we continue towards the end of summer. Most shippers are holding to averages, particularly in the smaller sizes. Fancy grade percentage is down this season due to high wind events, which have 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: Supply of larger sized fruit continues to improve while supply remains plentiful 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: **ESCALATED** Lettuce quality and supplies are okay. We are still seeing lighter weights and increased demand. There have been some reports of INSV, but they have been minimal so far. There is some light to moderate levels of sclero, fusarium and thrip damage. There have been lower yields from the smaller framed lettuce heads and increased disease pressure in the fields. Some growers are holding to averages. The market has once again escalated. **Iceberg VA: ESCALATED** Quality and supplies look okay. Some growers are holding to averages.

Romaine & Romaine Hearts: **ESCALATED** Romaine and Romaine heart quality and supplies are okay. There have been some reports of fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Some growers are holding to averages. Organic Romaine Hearts and Romaine Hearst 12/3 and 7/6 are triggered. **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: Quality is good, but supplies are a bit light. We have seen mildew and fringe burn pressure.

Eastern and Western Vegetables:

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Green Bell Pepper: EXTREME Light supply continues, and demand will remain strong this week. In the west, Bakersfield is 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 so scaling back portions and making substitutions will be necessary over the coming weeks.

Color Bell Pepper: EXTREME High demand and very short supply out of the east and west coasts have driven markets to record highs this week. Canada remains steady on 11# all sizes but prices are up. Transitions and rain delay 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: ESCALATED Supplies in general are fair across most varieties out of Mainland Mexico, Baja and California this week. Supply is slowly improving as is quality. Tomatillo and Red Fresno are the tightest this week. With the Red Fresno being so tight for the coming weeks we recommend subbing to red jalapeno.

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 out of North Carolina and Tennessee is slowly improving. Quality is outstanding in the west and fair in the east.

English Cucumbers: Lighter 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 remains good, though recent rains have impacted quality and shelf life. Supply of French beans out of Mexico is currently low, contributing to tighter overall availability.

Zucchini/Yellow Squash: Loading new crop out of the Carolinas and Tennessee, markets have eased back. In the west, we are now in full production out of Fresno and Baja with some lingering production out of Sonora. Quality is good.

Herbs: WATCHLIST

Basil quality has improved out of both Colombia and Mexico, providing some relief to recent challenges. **Tarragon** production has been impacted by the weather, and supply is expected to remain low for the next two to three weeks.

Imported chervil continues to arrive in low volume from Ecuador, keeping availability limited.

Melons

Cantaloupe: We have completely transitioned to the central valley this week and loading fruit out of Firebaugh and 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 distributions is starting to improve with a good mix of 9's and 12's available; some 15's as well. Supply should be steady going forward barring any unforeseen weather that could impact the crop.

Honeydew: Honeydew production has leveled off and the crop is producing a fair distribution of 5's and J6's; 8's are very limited. We do expect supply and sizing to remain stable for the next several weeks. Quality is excellent; mostly clean shell, we see occasional scarring on these first picks. Brix levels on the dews are mostly in the 14-16% range.

Golden Honeydew: Limited supplies available.

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: EXTREME Production out of Baja and Guanajuato has slowed significantly due to seasonal transitions, while cooler weather has also reduced output in Peru. Across all regions, sizing remains skewed toward small and standard fruit, with larger sizes extremely limited. These combined factors have tightened overall availability, and the market has responded with increased activity. We are seeing a production gap until the end of July on White Asparagus.

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

Broccoli/Broccoli Crowns: Quality and supplies are improving. Insect pressure (diamond back moth) has been reported and is affecting yields. MX still has extreme shortages. The market is no longer escalating, but some growers are still holding to averages. Organic Broccoli is still triggered.

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

Brussels Sprouts: EXTREME Supplies are still very tight. Insect pressure and internal browning have been reported. Growers are holding to averages when they can, but we are seeing prorates from some of the larger growers. A Market Alert was sent out. 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 another week. The market is still at the Extreme Trigger.

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: Quality and supplies are good.

Celery: Quality and supplies are good right now.

Corn, Sweet: ESCALATED Markets remain strong as the summer transitions are underway in the east. 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. We have been seeing prorates.

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 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 Quality on Guatemalan snow peas and sugar snaps remains consistent, with no major changes reported. Improved volume is anticipated within the next two to three weeks. Peruvian production continues at a steady pace, with fair quality being maintained. The domestic supply of snow peas and sugar snaps continues to be limited, contributing to tighter overall availability.

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 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.

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East Coast:

- **Round and Roma Tomatoes:** Supply is slowly ramping up out of North Carolina and Tennessee. Current quality will be mixed due to the weather but should improve with each harvest. Round volume should improve towards the end of next week while Romas are short, overall volume should improve over the next week.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Improving supply available as we emerge from fields that were impacted by rain. Quality is gradually improving.

Mexico:

- **Round Tomatoes:** Volume will slowly improve over the next week, crossing through McAllen and Otay. Larger sizes are short; good supplies on 5X5-6X6's overall demand is mixed, and quality is excellent.
- **Roma Tomatoes:** Production is better this week out of Jalisco, San Luis Potosi and Baja. The quality remains good.
- **Grape Tomatoes:** Good supply and weak demand have put downward pressure on price. Quality is good.
- **Cherry Tomatoes:** Most of the volume seems to be crossing from the Baja; quality is very good. Demand is flat.
- **Medley Mixed Tomatoes:** 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.
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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.