



Weekly Market Review August 8, 2025

Overview

Tariff Update: President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. However, a 10% tariff as well as an additional 5% reciprocal tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.

Post Suspension agreement demand continues to be decent for Mexican tomatoes going into the weekend being the domestic supply is short once again this week due to weather in the east. Demand for smaller sized rounds has shifted west to McAllen and Otay Mesa putting upward pressure on FOB prices for those sizes; larger sized fruit was lower in price this week. While we navigate the termination of the agreement there are still a lot of unknowns about how this will impact costs but as we can see demand is not one of them. Grape Tomato supply is good out of all regions as are other varieties in the snaking category. Roma demand is down this week and price is reflective. 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 crops are 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 supply remains stable, with strong inventory levels reported across Mexico, California, and offshore sources. Mexico's harvest is steady this week, with the Flor Loca crop providing ample volume across all sizes. California production has slowed due to reduced demand and is expected to taper further as the season progresses. Peru continues to ship strong volumes, offering excellent availability of large and jumbo fruit. This remains an ideal time to promote all sizes and countries of origin. Temperatures in Salinas continue to be mild. We are seeing 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 Romaine market is once again rising. Lettuce supplies are also still limited. We are still seeing lighter weights and lower yields due to smaller heads and increased insect pressure. Growers are covering averages for now, but quality is still good. The industry is expected to see lighter lettuce supplies for at least the next few weeks. Romaine Hearts are still escalating. Fringe burn and INSV are present in some fields. Value Added Romaine is now also escalating with demand driving that market. Broccoli supplies have improved with the CA growers but we are 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 with reports of increased insect pressure, quality issues could arise. Brussels Sprouts supplies are still tight. Some growers are losing yields due to

quality. Salinas has offered some relief, and the growers are no longer holding to averages but the market is still at the extreme level. Hopefully we will see that ease up a bit soon. Fennel/Anise is also still at the Extreme level. Supplies continue to be very tight. Sizing is small and growers are holding to 8–10-week averages. As of right now, it look like the market will stay limited for several weeks. Bok Choy, Napa, Endive, Escarole and Leeks remain escalated. School is now back in session so demand will start to increase. The summer months always bring quality and supplies issues, and we can expect things to be a bit of a roller coaster for the next few months. 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. Expect to transition into pink grapefruit within a couple of weeks. 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. 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. The California garlic crop has begun, and our partners are not currently taking on new volumes until they have a better idea of their crop. Please keep this in mind when adjusting commitments or requesting new volume!

Market Alert List

- **Asparagus – EXTREME**
- **Bell Pepper: Red, Yellow and Orange – EXTREME**
- **Blackberries – ESCALATED**
- **Bok Choy – ESCALATED**
- **Brussel Sprouts – EXTREME**
- **Cilantro – ESCALATED**
- **Endive and Escarole – ESCALATED**
- **Fennel, Anise – EXTREME**
- **Chile Peppers (Tomatillo and Red Fresno)–ESCALATED**
- **Leeks – ESCALATED**
- **Lettuce/VA Lettuce – ESCALATED**
- **Napa – ESCALATED**
- **Romaine Hearts/VA Blends – ESCALATED**
- **Sweet Corn – ESCALATED**
- **White Asparagus – ESCALATED**

Watch List

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

Fruits & Vegetables

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Avocados: WATCHLIST The U.S. avocado industry closed last week at 53.9M pounds, with 35.5M pounds harvested in Mexico and 31.5M pounds shipped to the U.S. Jalisco now represents 16.7% of Mexico's shipments. Mexico continues transitioning between crops, with 84% of current harvest volume coming from the Off-Bloom crop, which is clean, peaking on 48s and 60s, and averaging 25% dry matter. The Main Crop is averaging 38% dry matter. Peru's 2025 campaign is approximately 81% complete, with over 530,000 metric tons shipped globally. Arrivals remain consistent in quality, and dry matter is holding around 25%, with week 31 harvest volume at 6.1M pounds. California's crop continues to show excellent quality, with availability expected through early fall. Colombia's Traviessa crop is winding down, with 2–3 weeks of volume remaining and the next harvest expected to begin in late August or early September from lower-altitude regions.

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. We will see an additional 5% reciprocal tariff applied to this category over the coming weeks as the Federal Government implements additional tariffs to counties that have not finalized trade deals; this is still very fluid this week and will provide updates as soon as possible.

Pineapples: WATCHLIST Pineapples will remain tight for some time due to low production in Central America. We are suggesting flexibility in sizes to ensure stability of the supply chain. Overall quality and taste are good. We will see an additional 5% reciprocal tariff applied to this category over the coming weeks as the Federal Government implements additional tariffs to counties that have not finalized trade deals; this is still very fluid this week and will provide updates as soon as possible.

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

Berries

Strawberries: Production continues to slow across the Salinas/Watsonville region as we move past peak volumes and into the seasonal decline. Overall volume is expected to continue dipping through August, with the Santa Maria and Oxnard fall crops set to begin in September. Quality remains good, though recent wet and foggy mornings have led to increased reports of bruising and decay. QA teams are staying vigilant, and harvest crews are removing sub-par fruit in the field to maintain premium pack standards. Fruit is fully color, medium to large sizing, and continues to eat well.

Blackberries: ESCALATED Production is ongoing in both Central Mexico (CMEX) and Oxnard, with Oxnard expected to continue through early September. CMEX volume is projected to increase steadily heading into the fall. Production in Baja and Watsonville have not yet begun. Watsonville is set to start in a very limited way next week, with gradual increases expected, while Baja will begin in late August and run through mid to late September. Overall supply remains very limited, and quality varies by region. Some reports of softness, leakers, and color reversion (red cell) have been noted, though pack outs are still grading well overall. Demand is currently exceeding supply, and pricing is expected to remain elevated over the next several weeks until volume improves.

Raspberries: Production continues in Central Mexico (CMEX), Baja, and Watsonville, CA. Both CMEX and Baja are seeing steady production with good quality. In Watsonville, volumes are declining as the region moves into a seasonal supply gap, though a rebound in volume is expected by late August to early September. California raspberry quality remains excellent, with sweet, aromatic, full-red berries that are eating exceptionally well.

Blueberries: Production is ongoing in Central Mexico (CMEX), Oregon, and Washington. CMEX volume is expected to ramp up throughout August, while the Pacific Northwest regions are now past peak production. Rain is in the forecast for several growing areas in Oregon and Washington this weekend, which may impact quality. Early imports from Peru are anticipated in the coming weeks. Overall supply is steady, and quality remains very 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 mixed between new crop and old. Seeing some spotting on older fruit and thin skin while new crop seems to have a more favorable appearance.

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 is good, but supplies are limited. We are still seeing lighter weights and increased demand. There have been some reports of INSV. There is some light to moderate levels of Scalero, 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 is 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 Hearts 12/3 and 7/6 are all still triggered. **Romaine VA: ESCALATED** Quality and supplies are okay, but we are keeping an eye on insect pressure and the weather. Some growers are holding to averages and the market is now escalated.

Green Leaf and Red Leaf: WATCHLIST 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: Improving supply will become available in the west as the coastal mountain plantings are slowly ramping up while east coast shippers are seeing improved volume on summer production. Quality is good and will continue to improve 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 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: ESCALATED Supplies are generally good across most varieties out of Mainland Mexico, Baja and California this week. Tomatillo and Red Fresno are the tightest this week; 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 was also stable out of North Carolina, Michigan and Tennessee. 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 Michigan and Tennessee. Quality is good

Green Beans: Supply and quality were mixed this week, and demand was light as most growing regions deal with weather-related pressure.

French Beans: WATCHLIST While production remains strong out of Guatemala, quality and shelf life have been impacted by recent rain and heat. We are still seeing container delays. There is a fair supply of French beans from Mexico.

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 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 16'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 are seeing occasional scarring on these first picks. Brix levels on the dewes are mostly in the 14-16% range.

Golden Honeydew: Good supply available on 5 and 6J's; quality is outstanding.

Watermelon: Watermelon volume is very good out of multiple districts including California, Arizona, Michigan, Illinois, North Carolina and Missouri. Quality is outstanding.

Mixed Vegetables

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Tomato Suspension Agreement Update

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Artichokes: Quality and Supply are good.

Asparagus: EXTREME Baja and Guanajuato production continues to be low due to transitions and seasonality. Peruvian production remains low due to cooler weather. Size from all regions is predominantly small and standard, with very few, if any, of bigger sizes. Markets are very active with less supply and sizing issues. Markets are expected to remain higher through the end of the month.

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

Broccoli/Broccoli Crowns: WATCHLIST 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 tight. Insect pressure and internal browning have been reported. Salinas is now up and running and has offered some relief, but the market is still at the Extreme Trigger. We should see the market slowly start to ease up.

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. Organic Cauliflower is escalated.

Celery: Quality and supplies are good right now.

Corn, Sweet: ESCALATED Markets are slowly easing back as newer districts start to ramp up production. We should see the gradual decrease in FOB pricing and more availability over the coming weeks. In the west, Tracy and Brentwood are now in full production. 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: The 2024-2025 California Garlic season is ending, and the California Garlic crop has begun, so you should expect to see some improvement in supply as they move into this harvest. Quality remains good although availability will be held to current commitments until the growers have had enough time to evaluate this crop.

Ginger: Supplies and 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): 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: 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 unchanged, with improved volume expected in about two weeks, weather permitting. Peruvian production continues to be steady, although quality has been fair. Domestic supply of snow peas and sugar snaps remains limited.

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.

Tomatoes:

Tomato Suspension Agreement Update

As we continue to navigate the impacts of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties will be imposed on Mexican tomatoes. We are actively working with each grower partner to gather a breakdown of how duties will be applied for tomatoes imported from Mexico and will provide updates once we have completed the implementation process.

East Coast

- Round and Roma Tomatoes: Supply is slowly ramping up out of North Carolina and Tennessee. Current quality will be mixed due to 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 week.
- Snacking Tomatoes (Cherry, Grape and Medley): Lighter supply available as we emerge from fields that were impacted by rain. Quality is gradually improving.

Mexico

- Round Tomatoes: Volume will slowly improve over the next week, crossing through McAllen and Otay. Medium sizes are short as demand has increased due to a lack of domestic round supply this week. Quality is excellent.
- Roma Tomatoes: Production is steady this week out of Jalisco, San Luis Potosi and Baja. Quality remains good.
- Snacking Tomatoes: Grape Tomatoes: Good supply and weak demand have put downward pressure on price. Quality is good.
- Cherry Tomatoes: Most of the volume seems to be crossing from the Baja; quality is very good. Demand is flat.
- Medley Mixed Tomatoes: 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. 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 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 crops 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.