



Weekly Market Review September 5, 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.

Demand on Tomatoes turned this week putting some upward pressure on Romas in particular; Rounds demand remains somewhat flat. We are watching a tropical storm that will make landfall in Baja this week and could impact the later part of the Baja growing cycle. It's too soon to assess or assume anything but we are keeping a close eye on its development and movement. Domestically production remains stable, and quality is fair out of Tennessee, Alabama and Virginia. Grape Tomato supply is good out of all regions as are other varieties in the snacking category. California production is mixed, and quality is good with fair demand. Production on Mixed Veg will continue to be challenging on Color Pepper but does continue to improve despite it being the tightest item available this week. Grape season continues to be into excellent production and quality; we should see steady markets now through late October. Melon supply out of Firebaugh is starting to slow down slightly as we are now on the backside of the California deal; days are getting shorter, and local deals will wind down as well. Quality is outstanding. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes in particular. Pumpkins and Fall items will be available this week. Avocado availability remains excellent, supported by consistent harvests in Mexico. Pricing is favorable for promotions given current industry supply. California production is tapering off as the season winds down, with harvests expected through October. Peru continues to deliver strong volumes, providing abundant large and jumbo fruit over the next month. With robust supply projected to continue for several weeks, this is an ideal window for promotional activity. Aventajada has begun harvest out of Mexico, overlapping with the ongoing Loca crop and ensuring strong volume through the Fall. Temperatures in Salinas remain warm. The weather will have an impact on supplies as we move into September. The warmer weather has brought insect pressure and is causing rapid growth on some of the commodities. Insect pressure and INSV have been reported in the fields of Lettuce, Romaine, Leafy Greens and Broccoli. The Lettuce market is no longer at an extreme level but is still escalated due to limited supplies. We are still seeing lighter weights and lower yields due to smaller heads, soil diseases and increased insect pressure. You will notice that lettuce is less dense during this time. Growers are covering averages when they can. We have seen some prorates, but quality is still good. The industry is expected to see lighter Lettuce supplies for at least the next few weeks. The fields have already been stressed and with the heat now being a factor, we may see issues with lettuce continue throughout the month. Romaine, Hearts and VA Romaine are all still escalated. Fringe burn and INSV are present in some fields. Broccoli has been on the watchlist and is now escalating. We are seeing heavy insect pressure, and the markets have started to react. Some growers are holding to averages. 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' quality and supplies are continuing to improve. The market is still escalated but it is continuing to trend down. Fennel/Anise are still at the extreme level. Supplies continue to be very tight. Sizing is small and growers are holding to 8 to 10-week averages. As of right now, it looks like the market will stay limited for several weeks. Bok Choy, Napa, Endive, Escarole and Leeks remain escalated. Summer always brings quality and supply issues, and we can expect things to be a bit of a roller coaster for the next few months. The Valencia season is beginning to wind down for some shippers, while others expect to continue harvesting for another eight weeks. Overall, we are seeing a good supply of 113s and larger, with fewer 138s available. The quality and flavor profile of the fruit is still looking great overall. Be aware that some shippers may be looking to hold to averages in the coming weeks. Choice Grapefruit is readily available, but most growers are requiring ample lead time for Fancy Grapefruits. Growers have fully transitioned into Pink Grapefruit. As we push towards the end of District 2's season, things are continuing to remain tight on small Lemons (165 and up) and most shippers are continuing to hold to averages. Size structure is peaking at 140/115ct choice. District 3 will hopefully be our light at the end of the tunnel and will give some relief on this strain, but small lemons are projected to remain tight into October. You will have to load import fruit in the east for smaller sized lemons, which is still subject to availability. District 1 preliminary evaluations are underway, with an early October start anticipated for the season. District 2 is in its final two weeks of significant harvest, and overall fruit integrity has been strong this year. Seasonally cooler weather through the summer allows fruit to remain on the trees longer than usual. Final clean-up picks are expected in early October. District 3 harvesting began this week in Coachella Valley. Fruit is showing good internal quality with medium to large size. Picking is expected to ramp up gradually through September, with a peak anticipated in late October. The global lemon market remains strained, and small fruit is extremely limited. In Mexico, early harvest is now underway, with weekly shipments climbing into the 20,000s and expected to increase substantially in the coming weeks. While fruit is still maturing, sizing is trending toward 140s, 165s, and 200s, with grade currently leaning more toward Choice. Argentina continues to ship significant volume to Europe and Russia, with 5.1 million cases sent to Europe alone, a 100% increase over total volume shipped in 2024. Peak sizes remain between 95s, 115s, and 140s. While overall quality has improved compared to last season, it varies by supplier. U.S. shipments are expected to wrap up next week, nearly two months earlier than last year. Chile has shipped close to 2 million boxes to the U.S. so far, with pack outs primarily being 115s, 140s, and 165s. Approximately 70–80% of the crop grade is Fancy. Total volume is projected to increase by about 5% over last year, reaching an estimated 21–22 million boxes. In recent weeks, Chile has averaged 115,000 – 175,000 cases per week into the U.S., with 70% of that headed to the East Coast. This pace is expected to continue as shipments to Asia and Europe remain strong. The California garlic crop is in full swing, and our partners are not currently taking on new volumes until they have a better idea of their crop. Please keep this in mind when adjusting commitments or requesting new volume!

Market Alert List

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

Watch List

1. Avocados
2. Artichokes
3. Broccolini
4. Cabbage
5. French Beans
6. Herbs
7. Lemons, Small Sizes
8. Limes (Large Sizes are short)
9. Pineapple
10. Ginger
11. Green Onions
12. Green Leaf & Red Leaf
13. Snow Peas & Sugar Snap Peas
14. Spinach
15. Spring Mix

Fruits & Vegetables

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Avocados: WATCHLIST Overall markets remain steady. The U.S. avocado industry closed last week at 60.6M pounds, with the gradual decline from Peru. Jalisco currently accounts for 15.4% of Mexico's shipments to the U.S. The Off-Bloom (Loca/Mendez) crop is averaging 26.3% dry matter, with sizing peaking on 48s and 60s. Mexico is essentially finished transitioning crops, with over 99% of harvest activity from Off-Bloom fruit. The 2025 Peruvian avocado campaign is approximately 92% complete, with more than 600,000 metric tons shipped globally. Depending on size requirements, programs are starting to transition back into different countries of origin. Approximately 6.6M pounds were harvested in week 35 from California. Dry matter is averaging 31%. Sizing continues to peak on 48s and 60s. Harvest volume has flattened out, though fruit quality remains excellent. Based on current harvest rates, California fruit is expected to remain available through October.

Bananas: Banana supply remains stable despite strong demand for school business rapidly ramping up. Overall, banana quality has been very good.

Pineapples: WATCHLIST Pineapples will remain 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 peak production out of California; quality and supply are stable on Flames, Sugraones and Ivory varieties.

Berries

Strawberries: Overall production continues to trend downward but should increase at the end of the month. Watsonville temperatures are expected to climb into the low to mid-80s this weekend before leveling off next week with highs in the mid-70s and lows in the mid to high-50s. Overripe fruit and bruising continue to be reported, and field crews are culling more aggressively to maintain clean packs. In Santa Maria, a warm weekend is also forecast, with highs in the mid-70s and lows in the mid to high 50s; volume in this region remains limited. Oxnard is anticipating similar conditions, with highs in the upper 70s to low 80s next week. Harvesting began there this week at only a few pallets, but volume is expected to build steadily, with significant availability projected by late September.

Blackberries: **ESCALATED** Overall volumes remain light but should begin to increase in the next several weeks. Production is ongoing in Central Mexico (CMEX), Oxnard, and Watsonville. Oxnard will continue through early September, while CMEX is expected to build volume steadily each week into the fall. Baja is scheduled to begin production in the second week of September. Watsonville has started harvesting twice weekly, though volumes remain light. Overall supply has improved, but quality varies by region, with some reports of color reversion and soft or leaky fruit.

Raspberries: Production continues in Central Mexico (CMEX), Baja, and Watsonville. Both Central Mexico and Baja remain steady with strong quality. Watsonville volumes are declining as the region approaches a seasonal gap, with recovery expected by early September. California raspberry quality remains excellent, featuring sweet, aromatic, and fully red berries.

Blueberries: Production continues in Central Mexico (CMEX) and Washington, though the Pacific Northwest is trending downward as the crop nears the end of the season. Early Peruvian imports are expected in the coming weeks. While the current supply remains steady, a sharp decline is anticipated moving into September and October. Prices are expected to rise as availability tightens.

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: **WATCHLIST** Supply is extremely tight this week on all sizes with larger sized fruit being the shortest. We do expect to start subbing sizes anytime soon for the larger side of the scale as old crops available continue to decline. The short-term forecast is lighter supplies through September, and pricing is to continue an upward trend for the coming weeks.

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

West Coast Lettuce

Iceberg: **ESCALATED** Lettuce quality is good, but supplies are limited. The market is still escalating but is gradually decreasing. We continue to see lighter weights and increased demand. We are still seeing signs of INSV. 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 and we have seen some prorates. Growers are also subbing labels to try and cover orders when possible. The soil borne diseases have really limited the harvestable acres. You will see smaller heads, and they will not be as dense as they normally are. The market is very active and will be a roller coaster over the summer as growers try and navigate the issues with the yields. **Iceberg VA: ESCALATED** Quality and supplies look okay. Some growers are holding to averages and we have seen some prorates.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine heart quality are okay, but supplies are light. The market is still trending higher due to increased demand. There have been some reports of fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Some growers are holding to averages. Romaine, Romaine Hearts and Organic Hearts are all still escalated. **Romaine VA: ESCALATED** Quality and supplies are okay, but we are keeping an eye on insect pressure and the weather. Some growers are holding onto averages and the market is still escalating.

Green Leaf and Red Leaf: WATCHLIST Quality is good, but supplies are a bit light. We have seen mildew and fringe burn pressure. We are seeing lighter carton weights.

Eastern and Western Vegetables:

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Green Bell Pepper: Steady supply available from all growing regions 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 and Mexican production will remain steady on 11# all sizes and prices are starting to come down. 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 continue over the next 7-10 days and recommend scaling portions for subbing green for color pepper where necessary while we navigate these shortages.

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

Mixed Chili Pepper: ESCALATED Supplies are tighter this week out of Mexico generally good across all categories due to a mix of heat and rain over the past several days. Red Fresno is the tightest this week and recommend subbing to red jalapeno when needed. California's quality is also compromised a bit by heat related pressure this week out of the central valley.

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: Light supply available this week. Quality is good.

Pickles: Light supply expected over the coming week out of Canada, Michigan and Tennessee. Quality is good.

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

French Beans: WATCHLIST Guatemala continues to show good supply on both organic and French beans, though container delays remain a challenge. Mexico is reporting fair supply of French beans.

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

Herbs: WATCHLIST Basil quality and supply remain strong out of both Colombia and Mexico. **Tarragon** production continues to be light, and mint volumes are lower than normal due to recent weather challenges. Imported chervil from Ecuador remains limited, and supply on marjoram is also tight due to weather-related impacts. Out of the West, supply is steady across most herb varieties, though **chervil and marjoram** remain exceptions. Heat continues to pose a risk to overall herb quality, which may be inconsistent in some cases.

Melons

Overview: Cooler temperatures as well as some scattered showers have slowed down production as we are past the peak in the California season. Regional melon deals are also starting to wind down, pushing more demand west which will tighten overall availability over the coming weeks, however, expect no interruptions in supply through transition.

Cantaloupe: Cantaloupe pricing has started to trend higher, especially on larger fruit. The primary sizing over the past week has been reg 9/12s with even some 15s being packed. This sizing profile should continue for the next 7-10 days. Overall quality remains strong. Netting has been consistent, and the shell color remains high. Internal quality has been very good with higher brix levels, mostly 14-16%, and we have had excellent eating fruit.

Honeydew: Honeydew production has started to taper off and size distribution is leaning heavy to 6's; 8's are very limited. Quality is excellent; mostly clean shells, we are seeing occasional scarring on these first picks. Brix levels on the dews are mostly in the 13-15% range.

Golden Honeydew: Limited supply available and quality remains good.

Watermelon: Watermelon volume has started to firm up as local deals wind down for the season. Still seeing fruit available in several districts but that will gradually decline as the weather cools across the country and fall approaches. Quality remains strong.

Mixed Vegetables

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Artichokes: Quality is good, and supplies are limited. Growers are holding to averages and there may be some substitutions on sizes.

Asparagus: ESCALATED Baja production continues to be low due to transitions and seasonality. Peruvian production remains low due to cooler weather. We should see this change in the next two weeks as more fields in southern Peru start opening. Sizing from all regions is predominantly small and standard, with few bigger sizes. Markets are still very active with less supply and sizing issues.

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

Broccoli/Broccoli Crowns: ESCALATED Quality is improving but supplies are limited with some growers. Insect pressure (diamond back moth) has been reported and is affecting yields. The insect pressure is limiting harvest. MX still has extreme shortages. The market is now escalating. Some growers are already holding to 10-week averages. Organic Broccoli Crowns are at the extreme trigger.

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

Brussels Sprouts: ESCALATED Supplies have improved. Insect pressure and internal browning continue to be reported but quality is also starting to improve. We are also seeing some elongated stems due to the rapid growth from the heat. The market is still triggered but is trending down. We should see things continue improve as we get into September.

Carrots (JUMBOS, MEDIUMS and CELLOS): Growers are still harvesting in Monterey County and Kern County district. Supplies are steady and the size of jumbos is good right now. Quality is good and should get even better as growers move forward into Lancaster and Cuyama. They will harvest there through November. When we look at the MX carrots, MX carrot volumes are decreasing due to natural seasonality as well as local markets emerging from Canada this time of year. Production remains the strongest in Guanajuato and Puebla and will start to lean more to Puenla as the year progresses.

Cauliflower: Quality and supplies are good. Organic Cauliflower is escalated.

Celery: Quality and supplies are good right now.

Corn, Sweet: Markets are slowly easing back as newer districts start to ramp up production. Just in time for the Labor Day push! We should see a gradual decrease in fob pricing and more availability. 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. Some growers are holding to 8-week averages, but we have seen some 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.

Green Cabbage: WATCHLIST Supplies and quality look good, but we are seeing poor yields in the VA cabbage as growers are trying to limit the core in the finished product.

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

Mushrooms: Lighter volume available due to transitions and production forecasts that were made below actual demand. Quality is good.

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

Parsley (Italian & Curly): Supplies and quality look good.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

Red Cabbage: WATCHLIST Quality looks good, but supplies are light.

Spinach: WATCHLIST Supplies are limited with some growers and quality is okay. We have seen some reports of weak texture, discoloration, wilting, moderate wind damage and there has been some insect damage. We have also recently seen heavy mechanical damage due to brittle texture. The warm soil temperatures are leading to rapid growth.

Spring Mix: WATCHLIST Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. We have added this item to the watchlist.

Snow Peas and Sugar Snaps: WATCHLIST Supply and quality on Guatemalan snow peas and sugar snaps remain good despite ongoing container delays. Production out of Peru is steady, though overall quality is only fair. Domestic supply continues to be limited. Market prices remain higher.

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 supplies 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 Tomatoes:** Supply slower to improve out of Alabama, North Carolina and Tennessee while new production starts in Virginia and New Jersey. Current quality will be mixed; several days of heat, rain and high humidity are causing several post-harvest issues days after the fruit is packed.
- **Roma Tomatoes:** Volume is gradually increasing and pricing was mixed this week based on location. Quality is fair and slowly improving.
- **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 is steady crossing through McAllen and Otay. Quality is excellent.
- **Roma Tomatoes:** Production is strong this week out of Jalisco, San Luis Potosi and Baja. Quality remains good. Demand and pricing were higher this week.
- **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:** Good supply crossing through McAllen and Otay. Quality is mostly good.
 - **Tomato on the Vine:** Stable volume available this week.

California

- **Rounds and Romas:** Improving production out of the East Valley and Gilroy this week. Crop conditions appear to be much stronger than central valley production. 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 crop harvests in mid-August and early September.

Pomegranate: Limited availability.

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

Cherries: Lighter supply out of Washington, New York and Canada.

Stone Fruit: New crop Peaches, Nectarines, Plums available out of the PNW. Carolina season is winding down.

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

Quince: Limited supply available this week