



Weekly Market Review ***October 2, 2025***

Overview

Transition time is here! We are starting to see crops move south as summer comes to a close. Zucchini, Bell Pepper Corn and Cucumber are ramping up in South Georgia. Out West, Squash and Cucumber are ramping up out of Nogales. With respect to Tomatoes, we expect to see some new crop production in South Georgia this week while the local deals are still coming along strong, this could continue until the first cold snap. Good supply available on all varieties. Mexico continues to see strong production as well. California production is mixed, and quality is good with fair demand. 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 us to continue to be flexible on Pineapple sizes in particular. Pumpkins and Fall items are available! Avocado harvests in Mexico remain steady and strong this week, providing ample supply across the industry. Pricing continues to be favorable, creating excellent promotional opportunities, particularly on medium and large sizes as the size curve holds normal. California and Peru are both winding down, with final arrivals expected within the next week, while Mexico's production is set to increase in the weeks ahead. With stable supply and attractive pricing projected to carry through October, now is a strong time to drive volume. In the East, vessel delays are disrupting the movement of Guatemalan products, while ongoing weather challenges in Guatemala are further pressuring production and quality. As a result, availability remains affected for Snow Peas, Sugar Snap Peas, Baby Peeled Carrots, Colored Baby Peeled Carrots, and French Beans. Hot and humid weather combined with rain in Salinas is causing many issues with crops. The temperature and the rain is affecting harvesting conditions, increasing soil borne diseases and keeping the insect pressure very active. Insect pressure and INSV continue to be reported in the fields of Lettuce, Romaine, Leafy Greens, Cauliflower and Broccoli. The Cauliflower, Lettuce, Romaine and Romaine Hearts markets are now all escalated. Iceberg is at an extreme level. Growers have limited supplies on each of those commodities, and we are seeing light weights, mildew and decay. Broccoli is still escalating, and we continue to see issues with supplies. There is still heavy insect pressure. Yields are decreasing. Growers are holding to averages and some have had to prorate due to the loss of acreage. The Diamond back moth is expected to affect supplies throughout the Salinas season and quality is now just okay. Broccolini also has extremely limited supplies. Prorates should be expected. Brussels sprouts quality is good, but supplies are extremely tight. Growers are holding to averages. The market is still at an extreme level and that is being driven by low yields. We can expect the light supplies to continue through at least the end of the month and possibly through November with the holiday pulls coming into play. Fennel/Anise are also still at an extreme level. Supplies continue to be very tight. Artichokes also remain escalated. Sizing is small and growers are holding to averages. Bok Choy, Celery, Napa and Cabbage all remain escalated. Growers are seeing increased demand and decreased supplies. Celery has very light supplies. With the holidays and football season upon us, we expect to see that market stay firm. Cabbage supplies have also tightened up. Growers are holding to averages. Fall is bringing quality and supply issues and with more rain in the forecast. We can expect things to be a bit of a

roller coaster for the next month until we settle back into Yuma. The Valencia season is beginning to wind down for some shippers as we approach Fall and Navels ramp back up (mid-late October). Navels are projected to be overall larger this season, with smaller fruit remaining tight into 2026. As of now, some suppliers are not anticipating a gap while transitioning to Navels, while others are having a gap in supplies. Please remain in close contact with your supplier on this matter and be sure to give ample lead time on orders so you can plan accordingly. The quality and flavor profile of the fruit is still looking great overall. Be aware that most shippers are holding averages on Valencia's. CA Pink Grapefruit is projected to go through mid-October. Texas/Desert Rio Grapefruit will begin slowly in mid-October and ramp up as we head into December. Availability will be tighter in October for grapefruit and then open back up in late November/December. Things are continuing to remain tight on small Lemons (165 and up) and most shippers are continuing to hold to averages, with anticipation of better supplies in the next few weeks. Size structure is peaking at 140/115ct choice in District 3. Fruit is showing good internal quality with medium to large size. Picking is expected to peak in late October. District 1 preliminary evaluations are underway; with an early October start anticipated for the season. Imported products are due to wrap up in early October. California Mandarins are anticipated to start in November and California Cara Caras and Bloods will ramp up in December. 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
- Artichokes – ESCALATED
- Blackberries – ESCALATED
- Bok Choy – ESCALATED
- Broccoli Florets/Crowns/Asian Cut – ESCALATED
- Brussels Sprouts – EXTREME
- Cabbage, Green/Shredded – ESCALATED
- Cauliflower – ESCALATED
- Celery/Celery Sleeved – ESCALATED
- Cilantro – ESCALATED
- Fennel, Anise – EXTREME
- Hot Pepper, Red Fresno – ESCALATED
- Lettuce Iceberg – EXTREME
- Lettuce VA Blends – ESCALATED
- Napa – ESCALATED
- Romaine/VA Blends – ESCALATED
- Romaine Hearts – ESCALATED
- Snow Peas & Sugar Snap Peas – ESCALATED
- White Asparagus – ESCALATED

Watch List

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

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 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.

Avocados: Markets remain steady with strong quality, as U.S. avocado volume closed last week at 65.4M pounds, marking a 26% increase from the prior week. Mexico reported a 63.7M pound harvest in week 39, with 55.8M pounds shipped to the U.S., and Jalisco accounting for 14% of that volume. The Off-Bloom crop is averaging 26.5% dry matter, with sizing peaking on 48s, while the Main Crop has begun harvesting and currently represents 22.5% of total volume, also peaking at 48s and 60s. In California, approximately 4.3M pounds were harvested in week 39, with fruit quality reported as excellent, though volume is tapering and expected to finish in October. Meanwhile, the Peruvian season is nearly complete, with final programs wrapping up and remaining fruit being directed to the EU market.

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 very short over the next 14 months at best due to low production in Central America brought on by drought, poor production and loss of acreage. Our contracts continue to maintain their integrity; however, we will need to remain flexible regarding sizes to ensure the stability of the supply chain. Overall quality and taste are good.

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

Berries

Strawberries: WATCHLIST All California growing regions have faced inclement weather over the past few weeks, with tropical moisture and warm conditions impacting Oxnard, Santa Maria, and Salinas/Watsonville. In Oxnard, humidity and moisture caused increased soft fruit and bruising, though quality is steadily improving with adjusted harvest schedules and we move past the water damaged fruit. Santa Maria saw widespread rainfall that will require cleanup efforts, but the region is expected to recover and continue producing for at least another month. In contrast, Salinas/Watsonville experienced significant rain and thunderstorms that canceled harvests for two days; given late-season conditions, operations there may cease for the year. Demand is expected to exceed supply in the weeks ahead, as weather damage has created quality challenges in newer fields while older crops have been further compromised. Customers should anticipate some softness or bruising in fresh packs. Growers are taking steps at the field level to mitigate issues and maintain premium standards as much as possible through this volatile period.

Blackberries: ESCALATED Production is ongoing in Central Mexico (CMEX), Baja, and Watsonville. Oxnard has finished for the season, while CMEX and Baja continue to ramp up each week into the fall. Watsonville is currently harvesting twice per week. Overall supplies have improved, though quality remains inconsistent across regions, with reports of color reversion and some occurrences of soft or overripe fruit due to recent heat, rain, and humidity in the growing areas.

Raspberries: Production is ongoing in Central Mexico (CMEX), Baja, Oxnard, and Watsonville, California, with all regions remaining steady and quality holding strong. Raspberry quality out of Watsonville is performing particularly well, with fruit showing excellent color, sweetness, and aroma.

Blueberries: WATCHLIST Production remains active in Central Mexico (CMEX), though supplies are tight and expected to stay that way through October. Quality has been strong, with firm fruit, good bloom, and excellent sizing. Peru shipments continue to face delays, with improved arrivals anticipated by mid-October. Demand continues to outpace supply, keeping markets active and pricing elevated.

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 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 okay, and supplies have gotten very tight. Growers are holding to averages. We are still seeing signs of INSV and now we are seeing lighter weights and ribby lettuce. With more rain in the forecast, we expect some production gaps over the next few weeks. The market is still very active. **Iceberg VA: ESCALATED** Quality is okay, and supplies are tight. Growers are holding to averages.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine heart quality are okay, but supplies are tight. The market is still trending higher due to increased demand. There have been some reports of light weights, fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Growers are holding to averages. **Romaine VA: ESCALATED** Quality is okay, and supplies are limited. Growers are holding to averages.

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:

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.

Green Bell Pepper: Steady supply available from all growing regions Quality is good.

Color Bell Pepper: Steady supply available from all growing regions Quality is good.

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

Mixed Chili Pepper: ESCALATED Supplies were stable this week crossing in McAllen; in the west crossing are light in Otay and California will begin to wind down for the season leading to the transition back to Sinaloa. Red Fresno was the tightest this week and we are recommending Red Fresno consider a sub to red jalapeno when needed. California's quality is good for most items; however, we will see lighter production due to weather this week.

Eggplant: Domestic supply is steady out of Fresno and the Local regions in the east. Quality is good. Mexico will start in a few weeks crossing in Nogales.

Slicer Cucumbers: Stable supply crossing through Otay and McAllen. Domestic supply was also stable out of North Carolina, Michigan and Tennessee. Nogales is on the horizon. 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. Mexico should start ramping up over the coming weeks. Quality remains strong domestically and the fields in Mexico show good development to date.

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 Production remains steady, though minor quality issues are being reported due to heat, rainfall, and shipping delays in the east. Supply of French beans out of Mexico is fair, with markets beginning to firm on both coasts.

Zucchini/Yellow Squash: Good supply out of the west will continue in California and ramp up out of Nogales. In the east we will see steady volume continue on the local programs most likely through first frost while South Georgia starts the fall season strong. Sizing will be on the larger sizes as we scratch new fields. This should subside and we should see a more even distribution of sizes over the next ten days. Overall quality is very good. New Crop Hard Squash is available for Fall promotions.

Herbs: WATCHLIST Basil production remains strong out of Colombia and Mexico, though some heat-related quality issues are still being reported. **Tarragon** supply continues to improve, while imported **chervil** volumes from Ecuador have slowed due to weather conditions.

Melons

Overview: Strong production in the west continues and will until transition back to the desert. 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: Strong cantaloupe production continues this week with the overall majority of what is being harvested are larger sizes. Still peaking on 6 and 9ct; 12's and 15's are very limited. Yields have exceeded expectations, but the current sizing pattern will likely mean flexibility of sizing may be required. Overall quality remains at optimum levels – great size, good color and flavorful internal quality. Brix levels are maintaining a 12-14% range as we move into late-season production.

Honeydew: Honeydew production is not as strong as the cantaloupe, but the sizing pattern is similar on what is being harvested. We have been seeing primarily 5s and 5Js since the end of last week leaving 6ct very limited. Flexibility of sizing will likely be required in the short term. The long-term forecast for honeydew is questionable as the Mexican growing region of Hermosillo experienced substantial rains three weeks ago which will likely impact the start of that program which is scheduled to begin the second week of October.

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

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

Asparagus: ESCALATED Baja production continues to be low due to field transitions from the north to the south, and weather. Peruvian volume and sizing continue to improve. Markets are active with less Mexican product and Peru just starting with better volume. Peruvian arrivals will be delayed starting at the end of this week due to mechanical issues with the shipping line. Expect higher markets with more air flown product due to the vessel delays.

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

Broccoli Florets/Broccoli Crowns: ESCALATED Quality looks okay; supplies are still limited. Yields are decreasing. Insect pressure (diamond back moth) is still affecting yields. The insect pressure has limited harvest. MX still has some supply issues. The market remains escalated. Most growers are still holding to 8 to 10-week averages. We have had reports of Browning, Pin Rot and Larvae from the insects. Organic Broccoli is still at the extreme trigger.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality is fair, and supplies are extremely tight on this item. Growers are prorating. Some growers only cover 50% of 10-week averages. Some growers also have escalated pricing.

Brussels Sprouts: EXTREME Supplies are extremely limited. We still have some growers struggling with yields and growers who pulled early from their fields to cover orders over the past few weeks are now having to wait for the new crops to catch up to demand. Insect pressure and internal browning continue to be reported but the quality looks good. The market is still at the extreme trigger. Growers are holding to averages.

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 Puebla as the year progresses.

Cauliflower: ESCALATED Quality is okay, but supplies are getting tight. Growers are battling insect pressure, and they are holding to averages.

Celery: ESCALATED Quality is good, but supplies are extremely tight. As we head into the Fall pull, the market prices are trending upward. Demand has risen due to schools starting back up and with football season in full swing. All Celery is escalated.

Corn, Sweet: Steady supply in the west and transition to South Georgia is underway in the east. Markets eased back this week and should see a smooth transition continue. Quality remains good but we will start to see some maturity issues on the local crops such as smaller ear size and kernel size will decrease once we settle into the fall production regions.

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: Leeks are no longer escalated; Quality and supplies look good.

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: ESCALATED Supplies have tightened up, but quality still looks good. 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 as summer production winds down; overall forecasts are below expectations and demand is higher. We are quickly approaching that time of year when holiday pulls at retail makes supply very short. 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 and 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: ESCALATED Supply from Guatemala remains limited due to adverse weather, with quality holding at fair levels. In Peru, production has begun to slow in line with market conditions and seasonal factors. Domestic availability of snow peas and sugar snaps is also only fair, adding to overall tightness. Prices are elevated under these supply constraints.

Onions:

The onion market is expected to remain stable throughout Q4. With harvest concluding, all products will ship exclusively from storage in the Pacific Northwest. While we may see a modest increase occurring, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

Potatoes:

Potato supply for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. Burbanks will begin to ship in limited volume in mid-October, though Norkotahs will continue to make up the majority of the supply. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

Tomatoes:

Tomato Suspension Agreement Update

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

East Coast

- Round and Roma Tomatoes: Supply is good on rounds; we will start to see lighter volume on Romas over the coming week. Season will start to wind down over the next two weeks out of Alabama, North Carolina Virginia and Tennessee. We expect to transition to Florida at that point. Some of the upper Midwest/ Pennsylvania and Michigan will wrap up this week and be done for the season. Current quality will be mixed but improving as growing conditions have improved over the past week. We do expect some weather this weekend which could impact harvesting but don't expect more than minor delays.
- Snacking Tomatoes (Cherry, Grape and Medley): AMPLE supply available out of the summer programs, we are also transitioning to South Georgia and Florida over the next ten days. Quality is outstanding!

Mexico

- Round Tomatoes: Volume is steady crossing through McAllen and Otay. We are keeping a close eye on weather in Southern California and Baja that may cause some production delays over the weekend but for the most part we feel markets will remain stable. Quality at all border crossings has been excellent.
- Roma Tomatoes: We are seeing slow demand and increased availability drive the market down this week. We are keeping a close eye on weather in Southern California and Baja that may cause some production delays over the weekend but for the most part we feel markets will remain stable. Quality at all border crossings has been good.
- Snacking Tomatoes:
 - Grape Tomatoes: Excellent 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: We have entered the Fall cycle in production and volume is lighter. We are seeing some rain in the Central part of the state and expect to see some limitations to harvesting. We do expect normal availability through the end of the season barring any unforeseen weather events. 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: New crop available out of California.

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

Cherries: Winding down for the season.

Stone Fruit: Peaches, Nectarines, Plums available out of the PNW as winding down.

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

Quince: Limited supply available this week.