



Weekly Market Review **December 4, 2025**

Overview

Production continues to ramp up out of Florida and Mexico for the winter. Markets feel rather stable going into the Christmas pull for most Veg items. Roma Tomato and Green Beans do feel like they are still somewhat volatile but will continue to evaluate going into the holiday pull with no shortages expected. Grape season is taking a sharp turn as supplies dry up on storage fruit and what is left has questionable quality/shelf life. Import fruit was expected to start unloading this week, however, the first vessel has run into an issue with USDA, and the product is currently on hold. We should see more fruit arriving in the coming weeks. We expect to see a very short and pricey market over the next 14 to 21 days. Import Cantaloupes from Guatemala has begun. Initial quality and brix levels are good, although sizing is heavier on the 9/12ct. Pineapple availability remains limited; shippers are asking that we continue to be flexible on Pineapple sizes. Mexico had a 67.2-million-pound harvest last week with 56.5 million pounds coming to the US. Jalisco accounted for 10%. Avocado supply remains stable with good demand driven by retail promotion and lower than average pricing. Lenticel is still present but is typical for this time of the year due to rain. Chile and Colombia seasons are underway with limited volume landing in the US. In the East, Guatemalan weather conditions have improved, although shipping arrival schedules have once again become unpredictable due to continued weather issues in the Caribbean Sea and port congestion. We will continue to see vessel delays. Strawberry demand is still exceeding supply, but we expect alignment over the next 10-14 days as production increases in Central Mexico (CMEX), FL, and Baja. Production in California is shifting as the summer-planted fall crop winds down, while the fall-planted spring crop begins to provide a steady winter supply. Quality is improving following recent rain, although some inconsistency in color and size remains as fields recover. CMEX is seeing weekly increases in production with strong early-season quality, and Baja is beginning to ramp up, with more meaningful volume expected after the new year. Florida is also increasing production, and availability is likely to improve over the next 10 to 14 days. With the recent rains finally easing and the fields beginning to dry out, we expect to see gradual improvement in both quality and supply. That said, harvesting conditions are still far from ideal. The ground remains wet, which continues to be a major factor in the supply challenges we are facing. Brussels sprouts, broccoli, strawberries, green onions, leafy greens, and baby greens were among the most impacted commodities. While quality will remain somewhat challenged this week, we anticipate noticeable improvement beginning next week. Some fields will continue to feel the effects of the recent weather, but most growers should see conditions steadily improve. Expect tight supplies on most baby leaf and leafy green items (this includes parsley, cilantro and arugula). Weather will most likely continue to be the biggest factor as we finish out the year. Brussels Sprouts, Sugar Snap Peas, Snow Peas, Boston/Butter, Red Leaf, Green Leaf, Broccolini, Lettuce, Romaine and Romaine Hearts markets all remain at the extreme level. You will likely still see shortages on some of those items. Brussels Sprouts and Celery supplies remain extremely tight. Growers are holding to very strict averages when they can, but you will see prorates as we approach the holiday season. Both commodities are likely to continue to escalate. The market is at the extreme level and that is driven by low yields. Brussels Sprout prorates will be at 50% through the end of the year. A Market Alert was sent out. Artichokes also remain escalated. Sizing is still small, and growers are holding strict averages. Anise/Fennel,

Broccoli, Bok Choy, and Cabbage all remain escalated. Growers are doing as much as they can to get out the best products that they can, but we will continue to see some quality and supply issues. We will keep an eye on the weather and continue to send out updates and information as we receive it. Cooler weather is moving in and while frost and ice are not currently a problem, we will be keeping an eye on that and will keep everyone updated if any issues do arise. The Navel crop is peaking in an 88/113 size structure. Some larger sizes are becoming more readily available. Color and taste profiles are excellent. Brixing on average of 12-13. Choice grade oranges are beginning to tighten up from the rain. Current field projections show small fruit will tighten up after the New Year. Lemons are readily available, peaking at 140/115 ct. Grapefruit Red Rios are the main variety being packed. Crop is peaking in a 40/48 size structure. Mandarins are ramping up this week. Please provide additional lead time on orders. Crop is peaking on 32/28. Caras have begun and bloods are anticipated to begin mid-December! Anticipate pale coloring to start, and in January you will begin to see the more classic characteristics of blood oranges begin to show up. The California Garlic crop reports that supplies are steady but will continue to tighten as the year goes on. Maintain your targets to ensure product as the season continues.

Market Alert List

- **Asparagus – ESCALATED**
- **Artichokes – ESCALATED**
- **Blackberries – ESCALATED**
- **Bok Choy – ESCALATED**
- **Boston/Butter Lettuce – EXTREME**
- **Broccoli Florets/Crowns/Asian Cut – ESCALATED**
- **Broccolini – EXTREME**
- **Brussels Sprouts – EXTREME**
- **Brussels Sprouts VA – EXTREME**
- **Cauliflower – ESCALATED**
- **Celery/Celery Sleeved – EXTREME**
- **Fennel, Anise – ESCALATED**
- **Green Leaf – EXTREME**
- **Hot Pepper: Anaheim, Tomatillo, Serrano, Caribe, Jalapeno, Habanero and Red Fresno – ESCALATED**
- **Leeks – ESCALATED**
- **Lettuce Iceberg – EXTREME**
- **Lettuce VA Blends/Better Burger – EXTREME**
- **Napa – ESCALATED**
- **Green Onions – EXTREME**
- **Red Leaf – EXTREME**
- **Romaine/VA Blends – EXTREME**
- **Romaine Hearts – EXTREME**
- **Snow Peas & Sugar Snap Peas – EXTREME**
- **Strawberries – ESCALATED**
- **Table Grapes – EXTREME**
- **Tomatoes: Romas and Snacking Tomatoes – ESCALATED**
- **White Asparagus – ESCALATED**

Watch List

1. **Blueberries**
2. **Cabbage, Red**
3. **French Beans**
4. **Herbs**
5. **Pineapple**
6. **Ginger**
7. **Spinach**
8. **Melons - Cantaloupe and Honeydew**
9. **Mushrooms**

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, tariffs will be removed over the next two weeks, based on their arrivals time in the United States on items such as Bananas, Coffee and Pineapple to name a few key items. Tariffs will remain in place on certain items and countries such as Columbia until trade new agreements are reached.

Avocados: Strong volume from Mexico is keeping the US demand satisfied. USDA is reporting a mostly stable market with a small decrease on the large sizes. Sizing is still peaking on 48s and 60s and dry matter in the high 20s. Due to the rain during this time of the season, there is an increased presence of Lenticel. Lenticel are small brown spots that develop on the skin after harvest, especially during the rainy season. Lenticel has no effect on internal quality. The Main Crop continues to ramp up, now representing about 70.2% of total harvest volume.

Bananas: Banana supply remains stable and demands are strong as we approach the holiday season. Overall, the banana quality was very good. We will see the removal of tariffs on these items over the next two weeks as we deplete inventory on hand and begin receiving products at the ports that will no longer have tariffs imposed on them. We will provide updates very soon on these rollout timelines.

Pineapples: *WATCHLIST* The Pineapple market has started to settle down some but remains tight. Demand remains high, keeping pricing stable. 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, the quality and taste are good.

Table Grapes: *EXTREME* Fall production is essentially done out of California, and storage inventories are rapidly declining as we still see strong demand post-Thanksgiving and going into Christmas. Existing California fruit will see more prevalent quality issues such as high shatter, waterberry, possibly mold and nesting as well as depleted shelf life as the fruit continues to ages. We have been anticipating the first significant volume to arrive from Peru and Chile however that fruit was put on USDA hold and could impact markets for the next 10 to 14 days once its released. Market volatility will be expected through the first of the year at the earliest; possibly the second week of January. We recommend scaling back portions until those markets ease back or consider making substitutions to alternate options such as cut fruit over the next two weeks.

Berries

Strawberries: *ESCALATED* Demand continues to exceed supply, though improving production in Central Mexico (CMEX), Florida, and Baja is expected to bring better alignment over the next 10 to 14 days. In Oxnard and Santa Maria, the summer-planted fall crop is declining as it approaches the end of its season, while the fall-planted spring crop in Oxnard is beginning to ramp up and will help maintain a steady supply through the winter. Quality is recovering well following recent rain events, with more favorable weather in the forecast. There is still some inconsistency in color and size as the crop resets after the rain and plant stripping, but quality is expected to improve with each harvest pass. Production in CMEX continues to increase each week, and early-season quality has been very good, with clean, well-presented packs. Baja is just beginning its season and will gain significance after the start of the new year as volume builds. Florida production is also increasing, although overall volume remains light, and is expected to become more meaningful within the next 10 to 14 days.

Blackberries: *ESCALATED* Production is ongoing in Central Mexico (CMEX) and Baja, and availability remains good. Overall quality is strong, although we are seeing some occurrences of softness and red cell or color reversion due to recent heat, rain, and elevated humidity in the growing regions.

Raspberries: Production is ongoing in Central Mexico (CMEX) and Baja with good availability. Overall quality remains strong, although some soft or overripe products are appearing due to recent heat, rain, and elevated humidity in the growing regions.

Blueberries: *WATCHLIST* Production remains active in Central Mexico (CMEX), and overall availability is strong. Quality and sizing out of Mexico have been very good, with consistent packs and strong field conditions.

Citrus

Limes: Supply is starting to shift heavy to larger fruit and quality will decline a tad as growers continue to harvest in older groves. Smaller sized fruit naturally is tighter and seeing continued upward pressure on the FOB prices. Long term we do expect some size and price vulnerability going onto the New Year.

Specialties: Blood oranges and Cara Cara's are anticipated to begin in mid-December. When bloods begin in December, please be aware that the typical "blush" exterior may not be present, though internally you will find it! By mid-January, you will begin to see more of the typical exterior "blush" color on bloods.

West Coast Lettuce

Iceberg: EXTREME Lettuce quality is okay, but supplies are still tight. Weights remain light. Some growers are prorating. The rain has caused harvesting delays, and we expect some production gaps over the next few weeks. The market is still very active. The weather has affected both harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season. **Iceberg VA: EXTREME** Quality is okay and supplies are okay. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Romaine & Romaine Hearts: EXTREME Romaine and Romaine Heart quality are okay, and supplies are still tight. There have been reports of bruising, mechanical damage, lightweights, fringe burns and light cupping. For the hearts, we are seeing very little heart material. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we get into the holiday season. **Romaine VA: EXTREME** Quality is okay, and supplies are still limited. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Boston/Butter Lettuce: EXTREME Quality is okay but supplies extremely are tight. We have seen mildew and fringe burn pressure. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Green Leaf, Better Burger and Red Leaf: EXTREME Quality is fair, and supplies are extremely tight. We have seen mildew and fringe burn pressure. We are also seeing lighter carton weights. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

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Green Bell Pepper: Steady supply available from Coachella, Nogales, McAllen and South Florida. Quality is good.

Color Bell Pepper: WATCHLIST Steady supply out of Coachella and Crossing through Mexico on blocky varieties. We expect to see shortages in the east until Florida starts field grown reds. Quality is good.

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

Mixed Chili Pepper: ESCALATED Supplies were lighter this week as this week's rain has caused harvest delays and ongoing quality issues on several varieties. Sonora and Baja continue to struggle with volume, and we expect Sinaloa will slowly break this week and should relieve some of the upward market pressure. We will see escalated markets on Jalapeno, Habanero, Anaheim, Tomatillo, Serrano, Caribe and Red Fresno were the tightest this week. With respect to Red Fresno, we recommend a sub to red jalapeno when needed.

Eggplant: Domestic supply is steady out of Florida as well as the desert. Quality is good. Mexico crossings were starting to ramp up this week as well.

Slicer Cucumbers: Supply crossing through Otay, Nogales and McAllen is steady this week and quality outstanding. Domestic supply will quickly transition to South Florida as Georgia lost most of its crop due to weather. Quality is good out of all growing regions this week.

English Cucumbers: Steady supply available this week crossing through Nogales and Canada. Quality is good.

Pickles: Supply ramping up out of Florida and Mexico. Quality is good.

Green Beans: Post-Thanksgiving has been light and has put downward pressure on prices this week. Supply is steady out of Florida as they break new fields, and crossings continue to be steady through McAllen and Nogales. Overall, quality is good. We expect to see stable markets going into Christmas and New Years Pull over the coming weeks.

French Beans: WATCHLIST Production remains strong, and overall quality continues to show improvement. Mexico is providing a fair supply of French beans, supporting steady availability.

Zucchini/Yellow Squash: Supply stable and quality is good out of Florida as well as crossing through McAllen and Nogales.

Herbs: WATCHLIST Basil production remains strong from Colombia and Mexico, though some quality issues have been reported due to heat in the fields. Imported chervil supplies continue to be limited as weather in Ecuador impacts production. Overall, herb availability is steady with good quality, except for sage, which remains tight due to weather-related challenges. Quality across some items may continue to vary depending on field conditions.

Melons WATCHLIST

Overview: Guatemalan production has improved with better volume on all sizes. Additional ports like PA, TX and CA can expect to receive product early next week. Quality has been good with consistent high brix. Imported honeydew volume should increase over the next week, but Mexican honeydews saw delays due to strikes at the border.

Cantaloupe: We are starting to see the sizing profile shift to the 9/12s on the import. Overall, the fruit is strong, with solid netting, good internal quality and brix levels ranging from 12-14%. Shippers are anticipating overall production to improve with the addition of more growing areas and a better size profile.

Honeydew: Sizing is heavier on the 6 and 8ct but there should be a shift to some larger fruit next week. Mexican product through Nogales slowed due to some protect at the border. Scarring is a common characteristic at this time of the year, and mud/dirt will also be seen.

Watermelon: Domestic watermelons can be found on both coasts; however, there is an upward trend in prices due to a decrease in supply. The supply of Mexican watermelons via Texas and Nogales has been constrained due to production challenges stemming from rainfall experienced last month.

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 Mexican production continues to show steady improvement as fields recover and output increases. In Peru, volume in the northern region of Trujillo remains consistent, while the southern region of Ica has slowed due to seasonal trends, which will shift the size profile toward smaller and more standard counts. Markets have become more active as seasonal declines in supply begin to influence overall availability.

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

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is okay, but supplies are still very limited. Growers have moved to Yuma, but the rain has limited yields. We have still had reports of Browning, Pin Rot and Larvae from the insects. Some growers are still prorating. **Organic Broccoli is still at the Extreme Trigger.** The weather has affected harvesting and quality. This is causing additional supply issues Yields will continue to be challenging as we go into the holiday season.

Broccolini and Sweet Baby Broccoli: EXTREME Quality is fair, and supplies are extremely tight on this item. Growers are prorating. Some growers are only covering 50% of 10-week averages. Pricing is at the extreme level. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Brussels Sprouts: EXTREME Supplies are extremely limited. Growers are struggling with yields. Insect pressure and internal browning continue to be reported, and quality just looks okay. The market is still at the extreme trigger. Severe prorates should be expected. Growers are covering 50% of weekly averages. Mid December is when we will see MX sprouts come into play so you should expect quality and supply issues until we reach Jan 2026.

Carrots (JUMBOS, MEDIUMS and CELLOS): Due to the excessive rain events in November, supplies are tight on Bay Carrots, Cellos and Jumbos. Availability will be limited. Rainbow Carrots remain steady and have great quality and supplies. 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. Rainfall has affected harvesting for some growers. Cello and Jumbo Carrots are the most heavily affected in all regions, and there will be limited availability until weather conditions improve.

Cauliflower: ESCALATED Quality is good, and supplies are improving. The market is still no longer at extreme level. Yields may continue to be challenging as we go into the holiday season but for now, things have improved.

Celery: EXTREME Quality is good, but supplies are extremely tight. The market prices continue to trend upward. Demand has risen due to the holidays and football season. The weather has affected harvesting and quality. This is causing additional supply issues Yields will continue to be challenging as we go into the holiday season.

Corn, Sweet: Lighter supply in the west while supply is steady out of Florida. We are in all new crop and quality is good.

Fennel: ESCALATED 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 are limited, and quality is okay. The weather has affected harvesting and quality. This is causing additional supply issues Yields will continue to be challenging as we go into the holiday season.

Leeks: ESCALATED Quality and supplies look okay.

Garlic: Quality remains good although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and market are steady.

Green Cabbage: Supplies are still tight, but they are improving. Quality is good. Some growers are still holding to averages. The weather is still affecting harvesting and quality. This could cause supply issues. Yields will continue to be challenging as we go into the holiday season.

Green Onions: EXTREME Supplies are very inconsistent. Quality looks okay. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Mushrooms: WATCHLIST We are into our typical holiday pattern now with lower volume and extremely high demand for the Holidays. Supply expected to be light through the first of the year. Quality is good.

Napa Cabbage: Quality is good, but supplies are tight. The market is increasing.

Parsley (Italian & Curly): Supplies and quality have both been affected by the recent rains. As with the baby leaf items, parsley was unable to be harvested, and growers will need to catch up on supplies. Prorates should be expected. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

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 still limited. We have still seen some reports of weak texture, discoloration and wilting. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Spring Mix: Supplies on Spring Mix are limited this week. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

Snow Peas and Sugar Snaps: EXTREME Supply from Guatemala remains limited as recent weather continues to affect production. Availability is expected to improve over the next one to two weeks. Production in Peru is ending as the season winds down. Pricing continues to be elevated as demand far exceeds available supply. Mexican production has recently begun, but volumes remain insufficient to meet market needs. Yields continue to be challenging, and most growers are only covering 50% of averages.

Onions:

The onion market is expected to remain stable throughout Q4. With harvest conclude, all products will ship exclusively from storage in the Pacific Northwest. While we may see a modest increase occur, 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 Tomatoes:** Supply is plentiful on new crop rounds out of Ruskin and Palmetto, and seeing deals made across all sizes with lackluster demand going into the Thanksgiving Pull. Quality is outstanding.
- **Roma Tomatoes: ESCALATED** Supply is slowly improving this week as growers break new fields however still expect some volatility this week Overall quality is good out of Florida.

➤ **Snacking Tomatoes**

- **Grape Medley: ESCALATED** Supply will remain tight over the next week; we hope to see more volume come on as the growing conditions continue to stay favorable.
- **Grape Tomatoes:** Supply is steady and quality is good.
- **Cherry Tomatoes:** Supply is steady and quality is good.

Mexico

➤ **Round Tomatoes:** Volume is steady crossing through McAllen and Otay. Quality is good.

➤ **Roma Tomatoes: ESCALATED** Supply is slowly improving this week as growers break new fields, however, still expect some volatility this week should the National Market improve. Overall quality is good

➤ **Snacking Tomatoes:**

- **Grape Medley: ESCALATED** Supply will remain tight over the next week; we hope to see more volume come on as the growing conditions continue to stay favorable.
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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 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: Steady supply available out of California.

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

Cherries: Done for the season.

Stone Fruit: Done for the season.

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

Quince: Limited supply available this week.