



Weekly Market Review September 25, 2026

Overview

Tomato production continues to fluctuate in South Carolina, Tennessee, and Virginia due to a combination of weather-related pressure and the season starting to wind down, resulting in upward pressure on the markets this week. Snacking Tomatoes remain the tightest over the coming weeks and we expect to see some relief once South Georgia starts in approximately 12 days. We are watching a storm off the coast of Baja that could impact the fall vegetable crop in Southern Baja and possibly Sonora. We will continue to assess this storm's path and update once it has passed. Mexico's production of Rounds and Romas remains steady; Grapes will be lighter this week due to transitioning to new blocks. Mexican growers expect stable production over the next few weeks and good quality, demand will be strong with a deficit out of the East. We are finally starting to see some relief in the Snacking Tomato market, but we still expect some challenges over the next week. In California, Tomato production remains steady, but demand is much higher. The Lime market will begin to see an uptick in price and volume decline. New crop will be significantly different, leaning heavily to smaller fruit. 150s and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks. Hot Pepper production is expected to stabilize across most varieties. Zucchini/Yellow Squash were both tight this week as well as Slicer Cucumbers. U.S. Table Grape supplies are steady this week, and quality is outstanding on the new crop out of California. We will also start to see the impacts of the Canadian Tariffs on Mushrooms affect the industry over the coming weeks. In addition to these increases, we will also see costs rise across the domestic supply chain, which mostly impacts growing and operating costs.

Hurricane Polo Outlook: We are watching a major hurricane develop off the coast of Baja that could impact the fall vegetable crop in Southern Baja and possibly Sonora, all areas where Tomatoes, Bell Peppers and Squash are grown for later part of Q4. We will continue to assess the path of this storm and update once it has passed.

Insect pressure, INSV, and Sclerotinia continue to impact production and are expected to remain a challenge throughout the Salinas season. Demand is increasing and supplies have become limited. Quality issues are also on the rise as disease and insect pressure continue to increase, particularly in Leafy Greens, Cabbage, Broccoli and Cauliflower. Diamondback Moth/insect pressure is heavy and is a large contributor affecting Cabbage, Broccoli and Cauliflower supplies. Growers are expected to hold to averages on all Lettuce, Romaine, Broccoli, Cabbage and Cauliflower commodities when they can, but prorates should be expected. Green Onions are also still extremely limited and will likely be prorated.

The Avocado market remains steady as Mexico continues to increase production as California and Peru seasons get ready to end in a few weeks. Mexico has begun harvesting their Avenajada crop and early reports have the size curve favoring medium to large fruit. This would match the current size profile and create a consistent transition into the new crop. California and Peru volumes are decreasing weekly but still adding vital supplies to the market. As we start to transition into the Fall season, we will start to see lighter color and smaller sizing on Cantaloupe and Honeydews. Over the next two months we will experience two transitions on Melons, in October we will move from Central California to Yuma, Arizona and in November will move into the Guatemalan import season. Some growers are starting to see signs of virus presence, which could impact supplies in Yuma.

Overall, Berry supplies remain mixed as cooler California temperatures improve some availability while other domestic growing regions continue their seasonal decline. Quality is generally good, although softness, leaking, bruising, sunburn, smaller fruit, and reduced shelf

life remain concerns in some areas. Near-term availability is expected to remain limited as domestic production decreases and imported volumes continue to build. Supply should gradually improve in October as production from Santa Maria, Oxnard, Mexico and Peru increases.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including Lemons and Oranges, with fruit generally trending larger. California Valencias are in full swing. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. Grapefruit supplies are a mixed bag with some suppliers anticipating a potential gap in supplies and others sitting comfortably. Be in close contact with your supplier on this matter.

Freight: Limited truck availability and record-high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including ocean freight providers, implement fuel surcharges that will impact cost inputs.

El Niño: While it's still too early to predict how severe the impacts of El Niño will be, we do know that impactful storms will likely hit the Central Coast. We will be adding updates as we receive them but for now, all indicators are pointing towards a strong El Niño taking shape over the next several months. Yuma will likely see increased precipitation, so growers are planning to place crops across various growing regions to try to mitigate supply issues. The growers do have plans in place and will be acting accordingly to try to minimize the effects of the weather event as much as they can.

Market Alert List

- **Asparagus – EXTREME**
- **Artichokes – EXTREME**
- **Boston/Butter Lettuce – ESCALATED**
- **Broccoli Florets/Crowns – ESCALATED**
- **Broccolini – ESCALATED**
- **Brussels Sprouts – EXTREME**
- **Cabbage – ESCALATED**
- **Cauliflower – EXTREME**
- **Cilantro – EXTREME**
- **Green Onions – EXTREME**
- **Green Leaf – ESCALATED**
- **Lettuce – EXTREME**
- **Limes (150s and larger) – ESCALATED**
- **Red Leaf – ESCALATED**
- **Romaine Hearts – ESCALATED**
- **Spinach – ESCALATED**
- **Squash, Zucchini and Yellow – ESCALATED**
- **Snow Peas – EXTREME**
- **Sugar Snap Peas – ESCALATED**
- **Tomatoes, Rounds, Romas and Snacking Varieties – ESCALATED**
- **White Asparagus – ESCALATED**

Watch List

1. **Blackberries**
2. **French Beans**
3. **Herbs**
4. **Ginger**
5. **Small Citrus Sizes across all Varieties**
6. **Spring Mix**
7. **Potatoes**
8. **Raspberries**
9. **Strawberries**
10. **Sweet Potatoes**

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. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.

Avocados: Mexico harvested 53.6 million pounds last week; the average dry matter is 27%. California harvested 3.1 million pounds and has an average dry matter of 29%. Peru sent 3.3 million pounds with dry matter around 25%.

Bananas: Banana supply will be stable, but production is being curtailed due to virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program. Bunker rates will be released this week and next; expect them to be higher due to rising fuel costs.

Pineapples: Supplies have tightened up, and we have seen an increase in open market pricing. Contract volume is holding firm, but open market availability has dropped. Suppliers are expecting this to last for 2 to 4 weeks. This should not affect quality, which has been good overall.

Table Grapes: Production is stable outside of California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Scarlett Royals, Allisons, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead of schedule and there may be supply issues at the back end of the season. Black grapes will start to decline over the next 3-4 weeks.

Berries

Strawberries: WATCHLIST Strawberry supplies have improved as lower temperatures across California have supported better production and availability. However, Watsonville and Salinas volumes continue to decline week over week as the season winds down. Some quality concerns remain, including bruising, softness, sunburn, and smaller fruit. Temperatures are expected to rise slightly over the next 10 days, which could place renewed pressure on quality and shelf life.

Blackberries: WATCHLIST Blackberry availability remains limited across Mexico and Watsonville. Quality is generally good, although some softness, leaking, and sunburn are being reported due to elevated temperatures. Watsonville production should remain steady in the near term, while organic volumes are expected to decline. Mexican production is anticipated to increase more significantly in October.

Raspberries: WATCHLIST Raspberry supplies remain limited across Mexico and Watsonville. Quality is generally good, with some softness, leaking, and sunburn reported. Watsonville production is expected to remain steady through late September before declining in early October. Mexican volumes should begin increasing more significantly in October.

Blueberries: Pacific Northwest blueberry volumes are declining quickly as the domestic season winds down, with quality remaining good. Peruvian arrivals are showing excellent quality, but conventional and organic availability remains limited during September. Overall supply from Peru is gradually increasing and should help offset declining domestic production in the coming weeks.

Citrus

Limes: ESCALATED Supply will slowly turn the corner over the coming weeks, and we should see some relief on FOB prices in general across all sizes. Currently we continue to battle sizing issues on new crop, with distribution skewing heavily toward 200s and smaller. Unfortunately, this is limiting larger sized fruit and there is a need to substitute with smaller sizes. We will continue to see this until the size curve stabilizes. Overall quality will continue to be a concern; external blemishes, oleocellosis, and limited shelf life may occur.

Lemons: Small lemons are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve.

Navels: Domestic Navels are all wrapped up.

Valencias: California Valencias have begun and are projected to have strained supplies on small sizes.

Mandarins: Import Mandarins are in full swing. Domestic mandarins will begin this November.

Grapefruit: California grapefruit has mixed availability.

West Coast Lettuce

Iceberg: EXTREME Lettuce quality is fair and supplies are extremely limited. Prorates should be expected. There has been an increase of disease and insect pressure. We have seen some reports of internal burn, wind burn and soil-related defects. We are also seeing smaller heads and light weights. The market continues to rise quickly. The rest of the Salinas season will be challenging for lettuce. Lettuce remains at the extreme trigger. **Iceberg VA: EXTREME** Quality is fair and supplies are extremely limited. Prorates should be expected.

Romaine & Romaine Hearts: ESCALATED Supplies and quality are fair. There have been reports of light weights, tip and fringe burn. We are seeing high core, soil concerns, and insect pressure. Yields are being affected. Baby Romaine disease pressure has also increased, and supplies will be light. All Romaine items are escalated. Growers are holding to strict averages. **Romaine VA: ESCALATED** Quality and supplies are fair. We are still seeing more core in the bags and some mildew. Growers are holding to strict averages.

Boston/Butter Lettuce: ESCALATED Quality is good, but supplies are limited.

Green Leaf, Better Burger and Red Leaf: ESCALATED Quality is fair and supplies are limited.

Green Bell Pepper: Supply is steady outside of California. Lighter supply out of the East due to ongoing rain and quality issues. We are seeing upward pressure on open market business. Greens in the desert are expected to start in six weeks.

Color Bell Pepper: Good supply is available out of Fillmore/Somis, Gilroy, Baja, and Tennessee this week. However, markets are expected to firm up a tad this week on red and yellow. Red is flushing with outstanding quality on open-field varieties. The Hothouse Pepper category is steady out of Canada and Mexico while open-field Canadian is flushing as well.

Jicama: Good supply and good quality available.

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

Mixed Chili Pepper: Supplies are stable on most varieties with steady volume crossing from Mainland Mexico, Baja and local programs in California, as well as the East Coast. Red Fresnos seem to be the shortest, and we see much higher prices per pound than normal.

Tomatillo: Good supply and quality available this week.

Eggplant: Central Valley volume is steady while local programs in the East (Tennessee, North Carolina and Michigan) were limited this week. Overall quality is good.

Slicer Cucumbers: Supplies crossing through Otay Mesa and McAllen are much improved with stable volume available. In the East, we are seeing good supply out of Tennessee and Michigan. Quality is good from all shipping points.

English Cucumbers: Steady supply and softer markets are putting downward pressure on the spot market this week out of Mexico and Canada. Quality is good.

Pickles: Lighter supply is available out of Georgia Florida, Michigan and Mexico this week. Markets remain firm and quality is good.

Green Beans, Round Type: New York and other local regions in the East seem to be in good production this week. In the West, Orange County and Baja supplies are limited and much higher in price versus the East. Quality is mixed by region. Pole beans, Kentucky Wonders and Half Runners are much higher.

French Beans: WATCHLIST Supplies of organic and conventional French beans from Guatemala remain good, along with solid availability of conventional French beans from Mexico. However, overall production remains below normal levels, and higher pricing is expected moving forward.

Zucchini/Yellow Squash: ESCALATED Very tight supply and higher demand have pushed pricing higher this week on Green and Yellow Squash out of Michigan, Virginia and California. We expect to see volatility in these markets over the next 2-3 weeks at minimum and we should see some price relief as growers break early fall blocks and production increases. Quality is good.

Herbs: WATCHLIST Basil production, quality, and supply remain good across both regions. On the East Coast, all herbs, including imported chervil, are readily available. On the West Coast, most herbs have steady supplies and fair quality, although chervil, Thai basil, tarragon, and marjoram remain limited due to heat.

Melons

Cantaloupe: With the change in seasons approaching, growers are producing more 12s and 15s than before. 9s are still readily available. Quality is still strong with high color and high brix levels.

Honeydew: Sizing still favors 5s, 6s are limited, and 8s are hard to find. Overall supplies remain tight, and suppliers are asking for flexibility on sizing. Quality remains strong with high brix levels between 12-14%. Mexican production will start soon, and we should see some relief in the market.

Watermelon: The market is starting to transition late season US crop from Texas and Georgia to imports. Most imports will start coming from Mexico. Pricing is steady even with lower supplies as demand tapers off. Quality throughout the growing regions has been good.

Mixed Vegetables

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated.

Asparagus: EXTREME The asparagus market remains extremely active, with demand far exceeding available supply. New fields have opened in Ica, Southern Peru, and although sizing is beginning to improve, overall volume remains limited. Mexican production is also extremely light and is expected to remain constrained for several more weeks. Supply and pricing pressures will likely continue until production from Ica and Southern Baja begins to ramp up.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is fair and supplies are extremely limited. Reports of browning and pin rot continue. Organic broccoli remains at the extreme level. With increasing insect pressure, we expect prorates to occur. All Broccoli is escalated.

Broccolini and Sweet Baby Broccoli: ESCALATED Quality is good, but supplies are now extremely limited. Growers are holding to strict averages.

Brussels Sprouts: EXTREME Quality is good, but supplies have tightened up.

Carrots (JUMBOS, MEDIUMS and CELLOS): Quality and supplies are good.

Cauliflower: EXTREME Quality is okay. Supplies have become extremely limited. Prorates should be expected from some growers. Insect pressure has increased drastically and is affecting yields.

Celery: Quality and supplies are okay. Disease pressure, black heart, remains a factor and is affecting harvestable acres. With school returning, demand is expected to increase, and the market will strengthen as we go into the fall. Organic Celery is escalated.

Corn, Sweet: We are seeing a split market with good supply available in the East while the West markets remain lighter than usual as we transition back to California, which is the primary shipping point for West Coast. In the East, we continue to see steady numbers out of Georgia, North Carolina and upper Midwest. Local availability will start to decline as we see cooler weather move into the upper Midwest and Northeast this week. Quality is good out of all regions.

Fennel: Quality and supplies have improved.

Kale: Quality and supplies look good.

Leeks: 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 markets are steady.

Green Cabbage: ESCALATED Quality looks good, but supplies are tightening up. Prorates should be expected. The market is rising and insect pressure is increasing.

Green Onions: EXTREME Quality is fair. We are seeing insect damage and small sizing. Supplies are extremely limited. Growers will be holding to strict averages when they can but prorates should be expected. MX has had monsoon-type weather and triple digit temperatures. Yields are being affected.

Mushrooms: Promotional volume is available for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years, Canadian mushroom farmers received unfair subsidies, giving them a clear advantage over the domestic mushroom farming industry. The USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62–4.97%. These duties will be applied once the ruling is formally published. This will not only increase the price of imported mushrooms from Canada but will also put upward pressure on the price of domestically grown product as well. This is something domestic growers have been seeking for some time to support increases in their operating costs over the past five years. We are also expecting to see domestic suppliers implement cost of living increases as the dust settles on the DOC rulings to compensate for increased growing costs, food safety, labor, etc. brought on by years of dumping practices out of Canada.

Napa Cabbage: Quality and supplies are good.

Parsley (Italian & Curly): Quality and supplies are good.

Rapini: Quality is good, but supply continues to be light. The market is strong; therefore, supplies are expected to remain light.

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

Spinach: ESCALATED Supplies and quality look good but we are seeing rapid growth from the warmer weather which is resulting in larger leaf sizing and weaker texture. Insect activity has also increased.

Spring Mix: ESCALATED Supplies are limited and quality is okay. We are starting to see some decreased shelf-life. All leafy greens are affected by disease pressure.

Snow Peas and Sugar Snaps: ESCALATED Supplies of Guatemalan snow peas and sugar snap peas remain extremely limited, resulting in a highly active market. Domestic availability is also constrained due to weather-related disruptions and ongoing field transitions. Tight supplies and elevated pricing are expected to continue in the near term. Snow Peas are the extreme trigger.

Onions:

The transition to the NW, Washington, Oregon, and Idaho is done. Overall, the market is still struggling to keep up with demand, elevating open market pricing. NW suppliers are reporting less volume on colossal and super colossal sizing due to extended periods of smoke from neighboring wildfires and heat.

Potatoes: WATCHLIST

Growers are shipping new crop potatoes, and some will start adding volume into storage in the upcoming weeks. With less acreage, issues with water and high nighttime temperatures, larger 40-70 count potatoes are limited and will remain that way throughout the season. Suppliers are still hoping that potatoes will size up over the next couple of weeks. Smaller 80-120 count potatoes have better availability. Current market pricing remains elevated and getting stronger on bigger potatoes.

Sweet Potatoes: WATCHLIST

Growers have started to harvest the new crops and will put them in storage to let the skin set before shipping. This will take 3-4 weeks before we start to see the new crop shipped out. Limited old crop supplies remain available nationwide, putting a premium on all sizes. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market. Quality has been fair to poor as we finish up the old crop.

Tomatoes:

Tomato Suspension Agreement Update

Currently, duties are being imposed on Mexican tomatoes. We do expect to see some reporting from the ITC on the impacts of duties and anti-dumping violations sometime this year. NO major immediate changes are anticipated. Q4 Updates:

Quarter 4 is upon us, and we need to remember this can be the most challenging time of year for the tomato supply chain with local and seasonal production winding down for the season. We will begin transitioning to Florida in the coming weeks as well as Mainland Mexico for the winter months; with a forecasted Super El Niño season expected we want to be prepared for any vulnerability to weather related pressure on supply. We will continue to monitor the weather in all growing regions as well as receive updates from our grower partners and provide that information to you as soon as possible.

East Coast

- **Round Tomatoes: ESCALATED** Volume is mixed this week and still short on larger sized fruit out of Tennessee and North Carolina, mostly due to rain delays and quality. Quality is mixed out of all regions. Georgia should start scratching in approximately 10 days.
- **Roma Tomatoes: ESCALATED** Supply will be lighter this week as production starts to decline on late summer plantings; South Georgia is expected to start in the next two weeks. Quality is fair at best due to weather-related pressure.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Lighter volume this week on Cherries, Grapes and Medley volume will be steady. Markets will tighten up as season peaks start to wind down over the next two weeks. Quality is fair at best. We should see transition to Georgia will start in 14 to 21 days.

Mexico

- **Round Tomatoes: ESCALATED** Supply will be tighter on all sizes this week, particularly the larger sized fruit. This scenario, combined with overall higher demand, will keep prices higher this week. Quality is outstanding on what is

crossing this week.

- **Roma Tomatoes: ESCALATED** Stable supply and quality available out of Jalisco and Baja. Demand is very good this week putting upward pressure on prices. The driver for this is high demand from the East and lower production numbers out of Baja.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Grape Tomatoes and Cherries are very short this week due to lighter harvesting and higher demand. Medleys seem to be readily available. Quality on what is crossing the border has been good across all varieties.

California

- Supply has been fairly stable on rounds however larger sizes seem to be limited and drawing a premium. Romas are stable as well. General call prices are up this week as demand from the East was higher due to the ongoing rain in Central Tennessee and surrounding areas. Quality is very nice outside of California currently on mature greens and vine ripers.

Other Fruit:

Apples: New crop Gala apples are being harvested, and inventory is building up. Granny Smiths are reported to have good sizing available. Red Delicious sizing is on the larger end 56-80ct. Fuji and Gold Delicious all have very limited storage supplies left, and new crop will start soon. New crop Honeycrisp apples have started, and good volume is available.

Pears: D'Anjou availability is limited; volume from both domestic and imports have dried up. The market remains stable, with new crop Bartletts. Red D'Anjou Pears are moderately available in U.S. #1 35–55ct sizes and should remain in the market for another couple of weeks. Bosc Pears are currently gapping until their respective new crop harvests.

Persimmons: New crop FUYUs available out of California.

Pomegranate: Good supply available; New Crop out of California.

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

Cherries: None or very limited supply available. Quality is not the best and will not improve until offshore starts.

Stone Fruit: Peaches and Nectarines are winding down out of California and other local regions. Good supply is still available on late season plums.

Papaya: Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

Mangoes: Steady supply out of Mexico and Brazil. Varieties: Tommy's, Kents, Palmer and Keitts.

Kiwi Fruit: Supplies are fair out of Chile; California Kiwi Berries available. Some golden kiwis are also available.

Quince: Limited supply available this week.

Figs: Black Mission and Brown Turkey available out of California.