Weekly Market Review
October 30, 2026

Overview

Tomato supplies will be short for the next two weeks, with occasional supply interruptions possible, particularly on Rounds and Grapes. We expect this to improve slowly by the end of next week with supply expected to increase daily by the second week of November. The Lime market remains firm across all sizes. Current forecasts indicate that smaller fruit will make up most production, while 175-count and larger sizes remain extremely limited. Substitutions with smaller sizes will be necessary over the next several weeks. Hot Pepper production is expected to tighten up on several varieties with quality being mixed. U.S. Table Grape availability will start to decline daily as the season comes to a close, Greens are currently the shortest. Offshore availability was limited this week but expected to improve by end of month. Cremini Mushrooms are in short supply due to production declines and yield losses caused by green mold. We also expect Canadian tariffs on Mushrooms to affect the industry over the coming weeks. In addition, costs are expected to rise across the domestic supply chain, particularly growing and operating costs.

Insect pressure, INSV, and Sclerotinia continue to affect production and are expected to remain challenges throughout the Salinas season. Supplies on some commodities remain extremely limited. Quality issues will continue as disease and insect pressure remain, particularly in Leafy Greens (Lettuce, Romaine, Green Leaf, etc.). Many growers are now in Huron, providing relief for Lettuce supplies, although transfer fees may apply in some instances. Cabbage, Broccoli, and Cauliflower are still seeing heavy insect pressure, but supplies have improved. Growers are expected to hold to average order volumes for Lettuce, Romaine and Green Leaf, but prorates should be expected. For Green Onions, growers are still holding to averages, but supplies are improving. We are approximately three weeks away from the transition, and supply and quality challenges will likely continue until production settles into Yuma.

Avocado supplies are tightening as Michoacan approaches a full week without harvesting, and existing U.S. inventories are beginning to dwindle. Market prices are increasing rapidly as limited supply reduces availability and puts pressure on upcoming shipments. Harvesting continues in Jalisco, but protest-related blockages affecting fruit movement have added uncertainty, and volumes cannot fully offset the loss of Michoacan production. Even after harvesting resumes, additional time will be needed to harvest, pack, ship, and ripen fruit before inventories recover. Expect further pricing increases, potential prorations, and loading delays if the disruption continues.

California Cantaloupe and Honeydew production is expected to continue through at least next week, although virus pressure in late-season fields could bring the Central California season to an earlier conclusion than the originally planned week of October 12. Yuma program is scheduled to begin that week with limited initial production, while the impact of recent Arizona rainfall is still being assessed. Sizing has shifted smaller due to weaker fields, cooler temperatures, and

reduced daylight, with larger fruit already commanding premium pricing. Internal quality remains consistent, with strong sugar levels. Availability may be tight during the regional transition, particularly larger sizes.

Strawberry supplies are declining as California rainfall and potential rain-related delays in Mexico limit production, with extremely tight availability expected into November and continued shortages through December. Blackberry volumes remain relatively steady in Mexico, although organic supplies are light and Watsonville production is winding down. Raspberry supplies are steady this week, but rain-related quality issues and reduced shelf life could tighten availability and push prices higher. Peru remains the primary Blueberry source, with volumes slightly below expectations but excellent quality across conventional and organic offerings. Over the coming weeks, Strawberry availability will remain the greatest concern, while Blueberry supplies are expected to improve in December as production increases in Mexico and Chile.

Citrus markets are experiencing tight supplies of smaller sizes, particularly Lemons, as fruit generally trends larger. A warm, wet winter is anticipated, and suppliers will work to mitigate potential supply disruptions caused by rain-related harvest delays. California Valencias are winding down, with Navels expected to begin in November. Cara Cara Oranges are anticipated to begin in mid-to-late November.

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
Avocados – EXTREME
Boston/Butter Lettuce – EXTREME
Cabbage – ESCALATED
Green Onions – ESCALATED
Green Leaf – EXTREME
Lettuce – EXTREME
Limes (175's and larger) – ESCALATED
Napa – ESCALATED
Parsley Italian – ESCALATED
Red Leaf – EXTREME
Romaine/Romaine Hearts – EXTREME
Strawberries – ESCALATED
Snow Peas – EXTREME
Sugar Snap Peas – ESCALATED
Tomatoes, Rounds, Romas – ESCALATED
Tomatoes, Grape and Cherry (Snacking) – EXTREME
White Asparagus – ESCALATED

Watch List

1. Blackberries
2. Broccoli
3. Cauliflower
4. French Beans
5. Herbs
6. Ginger

7. Small Citrus Sizes on Lemons/Oranges
8. Mushrooms – Cremini (Limited)
9. Potatoes
10. Raspberries
11. Sweet Potatoes
12. Tomatillo and Hot Pepper

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: EXTREME Avocado supplies are tightening rapidly as the harvest disruption in Michoacan extends toward a full week, with U.S. inventories dwindling and market prices rising sharply. The loss of more than a week of harvesting would significantly disrupt the industry's supply chain and its ability to replenish available fruit. Trucks carrying avocados from Jalisco are now being blocked by protesters, further limiting volumes available to the U.S. market. This development reduces the industry's ability to use Jalisco production to offset the interruption in Michoacan. If harvesting does not resume this week, industry-wide shortages are expected, increasing the risk of prorations, loading delays, and unfilled orders. Even once harvesting resumes, recovery will take time as fruit moves through harvesting, packing, inspection, transportation, and ripening. Customers requiring conditioned or ripened fruit may experience a longer recovery period as inventories are rebuilt. Growers and shippers continue working to fulfill existing programs while prioritizing the safety of their crews and operations. Expect continued upward pricing pressure and increasingly limited availability until harvesting and fruit movement resume.

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 winding down in California; the season is approximately 70% complete. Fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix levels. Current varieties include Autumn Royals, Globes, Ivory, Timson, and Summer Royals. We will need to monitor the market closely as the season progresses because the crop is approximately two weeks ahead of schedule, potentially creating supply issues toward the end of the season. Black grape supplies are expected to decline rapidly, with the season likely to conclude in two weeks.

Berries

Strawberries: ESCALATED Strawberry supplies continue to decline following the rain events across Santa Maria, Oxnard, Salinas, and Watsonville. Mexico was expected to ramp up more quickly to help offset these declines; however, several anticipated rain events could significantly reduce projected volumes and delay that relief. Quality concerns over the next several weeks may include reduced shelf life, bruising, softness, premature breakdown, misshapen fruit, and pale color. Supplies will be extremely tight moving into November and are expected to remain limited through December, with meaningful improvement dependent on weather conditions and production increases in Mexico and Florida.

Blackberries: WATCHLIST Blackberry volumes are somewhat steady in Mexico, with direct exports to Texas underway, although organic availability remains light. Watsonville production is winding down, and availability is limited. Quality is generally good across both regions, with some softness and leaking fruit reported.

Raspberries: WATCHLIST Raspberry supplies from Mexico remain on par this week, with exports already moving into Texas. Rainfall has had a slight impact on quality, which remains fair to good overall. Some reduction in shelf life may be experienced over the next few weeks as the industry works through rain-affected fruit. Expect tighter availability and potential upward pricing pressure until production stabilizes.

Blueberries: Peru remains the primary source over the next few weeks before production begins to wind down and supply transitions to Mexico. Peruvian volumes remain slightly below expectations, consistent with typical seasonal availability. Quality remains excellent across both conventional and organic offerings. Overall supplies are expected to improve in December as production from Mexico and Chile increases.

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 remain in tight supply. Some suppliers will not accept new orders for smaller sizes until supplies improve.

Navels: Domestic Navels are set to begin in November.

Valencias: California Valencias are winding down for the year and should finish in November.

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: EXTREME 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 now at the extreme level. Growers are holding to strict averages when they can but prorates should be expected. ***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 when they can but prorates should be expected.

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

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

Green Bell Pepper: Supply is lighter out of California this week, and markets are expected to firm up; Coachella is about two weeks out. Improving supply out of South Georgia.

Color Bell Pepper: Supply is tightening this week as coastal California regions begin to wind down for the season, and we prepare for transition to the desert. The Hothouse Pepper category has also turned the corner and firmed up.

Jicama: Good supply and good quality available.

Mini Sweet Pepper: Supply lighter this week and expected for the next several weeks. Quality is good.

Mixed Chili Pepper: WATCHLIST Supplies are lighter this week on several varieties: Poblano, Thai Chili and Serrano. Sonora is done, Baja is wrapping up as well as California, Sinaloa will be the new region going forward. Good supply in the Southeast. Red Fresnos seem to be the shortest, and we see much higher prices per pound than normal.

Tomatillo: WATCHLIST Very tight this week and supply is expected to be a challenge through Thanksgiving.

Eggplant: Improving supply out of Nogales and the desert in the west. Good supply available out of South Georgia. Overall quality is good.

Slicer Cucumbers: Supplies crossing through Nogales, Otay Mesa and McAllen are lighter this week. In the East, we are seeing good supply out of South Georgia. 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. Quality is good.

Pickles: Lighter supply is available out of Baja and South Georgia. Markets remain firm and quality is good.

Green Beans: WATCHLIST Round Type: Good supply out of South Georgia; markets in the west are higher for product out of Orange County and Baja. Quality is mixed by region.

French Beans: WATCHLIST Guatemalan production remains at approximately 35 to 40% of normal levels due to rain-related quality issues and unfavorable field conditions. Supplies may improve in two to three weeks, depending on field recovery and weather conditions. French bean supplies from Mexico also remain limited.

Zucchini/Yellow Squash: Improving supply out of South Georgia and Mexico crossing in Nogales available this week. 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

Overview: California is now done for the season and the transition to the desert is complete. Very light offshore volume may become available by the second week of November.

Cantaloupe: Production consists mostly of 9-count and 12-count fruit, with very few jumbos, which is typical for this time of year. Fruit has a slightly greener cast, but internal quality has been very good. Brix levels have settled mostly in the 12%–14% range. Due to rain during the growing cycle, some fruit may have dried dirt on the exterior. Harvest crews are working to clean the melons as thoroughly as possible while keeping pace with harvest volumes.

Honeydew: Current production consists almost entirely of jumbo fruit. Since last week, sizing has peaked at 4Js and 5Js, leaving 6s and 8s in very limited supply. We are exploring alternative ways to meet demand for smaller fruit, including packing 6Js or sourcing honeydews to ship with cantaloupes. As is typical for Yuma, honeydews may show some external scarring but are of sound overall quality.

Watermelon: The market is starting to transition the late-season US crop from Texas 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: Quality and supplies have improved.

Asparagus: EXTREME Weather-related production challenges in Peru and Mexico continue to reduce supplies, affect quality, and push prices higher. Mexican volumes are expected to remain lower for the next 10 to 14 days, adding pressure to an already tight market. Southern Peru is nearing the end of its season as northern production increases, shifting availability toward smaller sizing and further limiting larger sizes through year-end. Warmer-than-normal temperatures associated with El Niño have also contributed to reduced yields and less predictable harvests, making consistent shipments more difficult. Expect extremely active markets, elevated pricing, and limited availability through the remainder of the year.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: Quality is good, and supplies have improved. Reports of browning and pin rot continue. Given the heavy insect pressure, we will continue to monitor this item.

Broccolini and Sweet Baby Broccoli: Quality is good, but supplies are limited. Growers are holding to average order volumes, and we will continue to monitor this item due to ongoing heavy insect pressure.

Brussels Sprouts: Quality is good, and supplies have improved but remain limited.

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

Cauliflower: Quality is okay. Supplies have improved. Insect pressure is still affecting some yields.

Celery: Quality and supplies are good. Organic Celery remains at the extreme level.

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 the West Coast. Brentwood corn volume is light this week. In the East, we continue to see steady numbers out of Georgia. 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 there is heavy insect pressure that is reducing harvestable yields.

Green Onions: ESCALATED Quality is fair, with insect damage and smaller sizes reported. Supplies remain limited but are improving. Growers will continue to hold onto averages but should be able to fill those average order volumes.

Mushrooms: WATCHLIST Extra volume is expected to decrease over the coming weeks as retail demand increases ahead of the holidays. Thanksgiving is just a month away! Overall quality is good; however, green mold may affect production in northern growing regions. Cremini volumes have declined significantly, potentially due to this issue. We are not currently experiencing problems with our grower partners but prorates may occur over the coming weeks. We have been advised that cremini production could be affected through November.

Napa Cabbage: ESCALATED Quality is good, but supplies are tightening up.

Parsley (Italian & Curly): Quality is good, but supplies are tightening up. Italian Parsley 60ct is escalated.

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: Quality is good, but supplies are limited. October is expected to be a roller coaster for this item. Insect activity has increased, and yields will be affected.

Spring Mix: 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 Guatemalan snow pea and sugar snap supplies remain extremely limited, with improvement expected in mid-November. Domestic availability is also limited due to weather-related challenges and field transitions. Mexican production is expected to begin in mid-November, providing additional supply as volumes build.

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 crop 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 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 demand continues to exceed supply. Quality also varies across regions. Georgia should see additional volume this week; however, it will not be enough to meet demand. We do not expect relief from Florida for another three weeks.

- ***Roma Tomatoes: ESCALATED*** Supply will remain light in South Georgia this week and should begin improving next week, with additional volume anticipated the following week. Quality is fair at best due to weather-related pressure. As with round tomatoes, significant relief is not expected until Florida production ramps up.

- ***Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: EXTREME*** Volumes of cherry, grape, and medley tomatoes are very light this week due to weather-related pressure in South Georgia. Supply interruptions may occur across the entire category in the East until Florida production begins. Quality is fair at best. We expect market volatility over the next two to three weeks.

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: EXTREME*** A combination of events between the East Coast and West Coast being shorter than expected, markets will be firm across the category out west with possibilities of supply interruptions. Quality on the product loading in the west is far better than the east on all varieties.

California

- Supply has been stable on Rounds; however, larger sizes seem to be limited and drawing a premium; Romas have been mostly 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 has been mostly consistent across California; we should start to see volume start to decline daily as the season is expected to wrap up in approximately three weeks.

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 both 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 has 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 FUYU and Hachiya available out of California.

Pomegranate: Good supply available; new crop out of California.

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

Cherries: Limited availability on offshore fruit this week.

Stone Fruit: Limited/ Done for the domestic season.

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