

Weekly Market Review
November 5, 2026

Overview

Tomato supplies will continue to be a struggle for the next 2-3 weeks with occasional supply interruptions possible, particularly on Rounds and Grapes. The Lime market remains firm across all sizes. 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. 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 Green . 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. Cauliflower supplies are now extremely limited, and the market is at the extreme level. For Green Onions, growers are still holding to averages, but supplies are improving. We are approximately two weeks away from the transition, and supply and quality challenges will continue until production settles into Yuma.

Avocado supplies remain extremely limited, with dwindling U.S. inventories driving higher prices. Picking resumed in Michoacán Thursday, November 5th, following two weeks of severe harvest restrictions, but limited harvesting opportunities will slow recovery. U.S. inventories are not expected to begin rebuilding until mid-next week, with broader replenishment taking seven to fourteen days, depending on harvest volumes, transportation, and ripening requirements. Expect elevated pricing, prorations, loading delays, and potential unfilled orders until sustained harvesting and shipments restore availability.

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. 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.

Over the next several weeks, expect continued Strawberry shortages and quality challenges across rain-affected Blackberries and Raspberries, while Blueberry availability should improve in December as Mexico and Chile increase production.

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 is seeing increased precipitation, so growers are placing 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***
- ***Cauliflower - EXTREME***
- ***Cilantro - 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***
- ***Tomatoes, Rounds, Romas – ESCALATED***
- ***Tomatoes, Grape and Cherry (Snacking) – EXTREME***
- ***White Asparagus – ESCALATED***

Watch List

1. ***Blackberries***
2. ***Broccoli***
3. ***Celery***
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. ***Table Grapes***
13. ***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 remain extremely limited, with U.S. inventories dwindling and market prices rising sharply. Growers in Michoacan resumed picking today after two weeks of severe harvest restrictions, but recovery will be gradual. Harvesting was `suspended for the first three days of this week, and scheduled continuing education for harvest supervisors on Saturday will further limit harvesting opportunities. U.S. inventories are not expected to begin rebuilding until mid-next week, with broader replenishment anticipated to take seven to fourteen days, depending on harvest volumes, transportation, and ripening requirements. Customers requiring conditioned or ripened fruit may experience a longer recovery period. Growers and shippers are doing everything they can to provide product and fulfill existing programs while prioritizing crew safety. Expect elevated pricing, prorations, loading delays, and potential unfilled orders until sustained harvesting and shipments restore inventories.

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: WATCHLIST Production is winding down in California; the season is approximately 90% complete. Over the coming weeks we will see increased quality defects in domestic fruit as it ages, higher shatter, dehydrated stems, discoloration, and possibly decay. Green grapes will dry up this week and very limited if any at all; we will be out by the weekend for sure and recommend subbing over to reds until new greens arrive the week of Nov 16th. We are expecting to be in all new fruit by the first or second week of December.

Berries

Strawberries: ESCALATED Strawberry supplies remain extremely limited following additional weekend rainfall, including close to an inch in Oxnard. Growers are removing rain-damaged fruit and recovering limited marketable volume, with softness, bruising, premature breakdown, and reduced shelf life remaining concerns. Moving into next week, supplies from California growing regions will remain limited as fields recover. Florida's recent rainfall could delay initial harvests by two to three weeks, while weather-related setbacks in Mexico continue to slow production increases. Additional rain is possible in Oxnard and Santa Maria around November 12, which could further delay recovery. Expect a challenging November, with meaningful supply improvement dependent on favorable weather and increased production from 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 but the market is trending down. ***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 and South Georgia; markets are expected to firm up. Quality is good.

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 short 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 French bean production remains limited, with improvement expected over the next couple of weeks. Rainfall continues to limit Mexican supplies, keeping overall availability tight and market pricing elevated. 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: We saw rain hit the entire desert region over this past weekend (including Mexican growing areas) which has impacted both harvest and quality. We were forced to lay out on Monday and Tuesday this week to give fields a chance to dry. Adverse quality will be felt over the balance of the Yuma crop with dirt/mud having a presence. Crews are cleaning the melons as best as possible but please keep expectations low on this late fruit. It would be helpful to share this communication with receivers as well to ensure all are on the same page. Offshore program slated to start the week of November 16th.

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 Asparagus supplies are expected to remain extremely limited across all sizes through year-end, with larger sizes facing the greatest shortages. Industry volumes are currently estimated at 50% to 55% of normal, and availability is increasingly concentrated in smaller sizes as production transitions from Southern Peru to Northern Peru. Mexican production remains significantly reduced due to heat, rainfall, seasonal declines, poor yields, and transitions between fields and growing regions. Peruvian volumes are also lower due to weather-related challenges associated with El Niño. No meaningful short-term improvement is expected, and current grower outlooks suggest substantial recovery may not occur until late in the third quarter of 2027. Mexico's Caborca season, which typically begins in late January or early February, is also expected to produce limited volumes.

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: EXTREME Quality is okay. Supplies are light. Insect pressure is still affecting some yields.

Celery: Quality and supplies are good but the market is rising. Supplies will get light as we get closer to the holidays and the market will escalate. 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 due to rain in the desert. 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. 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 to 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 increase.

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 have completed the potato harvest for the season and are shipping from the new crop as storage inventories are established. Reduced acreage, water limitations, and high nighttime temperatures have contributed to smaller sizing, leaving 40- through 70-count supplies extremely tight, with limited availability expected throughout the season. Smaller 80- through 120-count potatoes remain more readily available. Market pricing remains elevated and continues to strengthen on larger sizes.

Sweet Potatoes: WATCHLIST

The 2026-2027 sweet potato harvest is nearing completion, with increased acreage and favorable harvest conditions supporting a larger crop this year. Early-harvested product has completed the sweat process and is now available for shipment, with overall quality reported as good. Supplies are expected to remain steady throughout the season, with additional availability in larger sizes, particularly jumbos. Pricing is expected to remain stable for the foreseeable future.

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 in 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.