

## Overview

Production continues to be steady out of Florida and Mexico due to optimal growing conditions. Steady supply and excellent quality expected through New Year.

**Tomatillos** are very short due to recent weather-related pressure, we are seeing a severe decrease in fresh tomatillo crossings. In addition to the volume decreases, we are also seeing spec variations mostly related to much smaller sizing being available. For the next 7 to 10 days, we expect to see shortages and pro-rates on this item as well as no peeled product being available.

**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 is expected to start unloading by the first of the year. Green grapes are extremely short and will need to sub over to reds for the next 2-3 weeks.

**Banana** supplies will get tighter going into the new year and expect to see some challenges on spot market business as growers navigate the challenges of increased demand globally combined with virus and economic pressures in the tropics.

**Cantaloupe** quality is good with solid brix levels. Rain and colder temps have caused a smaller fruit profile and lower yields. **Honeydew** supplies remain tight, and sizing is heavy to the smaller 8 counts.

**Pineapple** availability has improved some but remains limited; shippers are asking that we continue to be flexible on Pineapple sizes.

The **avocado** harvest will be limited this week and next due to the holidays. 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 year due to rain. Chile and Colombia seasons are going strong with limited volume landing in the US. California and Baja are forecasted to receive rainfall from Tuesday through Friday. Once rainfall begins, strawberry harvests in these growing regions are expected to be postponed. To maintain coverage, growers plan to utilize Central Mexico production loading through Texas as well as production loading in Florida. In addition, Mexican product may be used to supplement California volumes for West Coast loading. These adjustments may require temporary substitutions of pack styles, labels, or specifications.

California's Oxnard and Santa Maria summer planted fall crop is rapidly winding down as seasonal production concludes. The weather continues to look good in Yuma. There is rain in the forecast, but the chances keep decreasing. If this weather continues, we should continue to see industry supplies improve across the board. For now, the industry acres are still down. Some commodities are ahead of harvesting schedules, and it has created lower yields and lighter weights. This was caused by the early rain that Yuma experienced.

While things are improving weekly, we still have some items that are struggling to find their footing. **Brussels Sprouts**, **Broccoli**, **Broccolini**, and **Green Onion** supplies remain extremely limited. **Baby** and **Tender Leaf** items have improved. **Spinach** is very tight, and growers are holding to strict averages when they can, but some prorates are to be expected. **Brussels sprouts** growers are also tight and adhering closely to averages where possible. Some prorating should be expected. With broccoli, we're seeing pin rot, water spotting and small sizing with some growers. Things are improving but with the limited yields, we have seen the market escalate once again. Yields are expected to be an issue through the end of the year. Broccolini has also tightened up. We are seeing very limited supplies across the industry. Growers are holding to very strict averages and prorates may be unavailable here soon.

### EXTREME



### ESCALATED



### WATCHLIST



Green Onions are also extremely limited. The previous rain in the MX growing region has affected the industry. Yields are very low and we have seen prorates from multiple growers. Limited supplies will continue until the end of January. Plantings for the next 6 to 8 weeks have been adversely affected by the rain. **Arugula** and **Cilantro** supplies are still tight and escalated.

**Spinach** is also now officially escalated. Growers will be holding to averages on those items. The **Celery** market remains high and is expected to stay that way through the end of the year. Supplies are tight and growers are holding to averages. **Anise/Fennel**, **Leeks** and **Napa** 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. While frost and ice are not currently a big problem, we will keep an eye on that and will keep everyone updated if any issues do arise.

Please be aware that the upcoming rain and continued fog will affect citrus harvesting through the holidays. The **Navel** crop is beginning to tighten up on smaller sizes (138/113/88). If you can sub for larger sizes, those are more readily available. Choice grade is continuing to tighten up on all sizes as well. **Lemons** are readily available, peaking at 140ct. Some shippers are anticipating larger lemons becoming slightly more snug, so be aware! **Grapefruit** Red Rios are the main variety being packed. Crop is peaking in a 40/48 size structure.

Some shippers are finishing up in California and only have product available in Texas, so stay in close contact with your suppliers on where they are loading their grapefruit. Mandarins are readily available and looking great! Please provide additional lead time on orders. Crop is peaking on 32/36. Caras have begun and are beginning to have more availability on all sizes. Bloods are beginning slowly. 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 averages to ensure product as the season continues.

## FRUITS & VEGETABLES

**Avocados:** Overall volume for the US remains great, and as we finish the year, the US is on pace to surpass 3 billion pounds of consumption for the year. Sizing continues to peak towards 48s and 60s count while dry matter remains 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 now accounts for 90% of the total harvest volume. Harvest will be low during this two-week holiday period; there is still plenty of supply in the pipeline to handle demand.

**Bananas:** **WATCHLIST** Banana supply will begin to tighten up over the coming weeks as demand globally increases, and production out of the tropics is steadily declining. A combination of virus pressure and low yields, increasing cost of production have put incredible strain on our favorite staple fruit. Overall, the banana quality was very good and supplied. The key to navigating this coming year will be consistency in supply, consistency in ordering patterns and staying far ahead of any issues that could impact the integrity of the program.

## BERRIES

**Strawberries:** **ESCALATED** California and Baja are forecasted to receive rainfall from Tuesday through Friday. Once rainfall begins, strawberry harvests in these growing regions are expected to be postponed. To maintain coverage, growers plan to utilize Central Mexico production loading through Texas as well as production loading in Florida. In addition, Mexican product may be used to supplement California volumes for West Coast loading. These adjustments may require temporary substitutions of pack styles, labels, or specifications. California's Oxnard and Santa Maria summer planted fall crop is rapidly winding down as seasonal production concludes. However, fall-planted spring crops in both regions are coming online at the right time to support steady supplies through the winter months. Quality remains good, with volumes expected to increase in early 2026. Baja Mexico is entering the early stages of seasonal production, with volumes expected to build steadily and become more impactful after the start of the new year. Quality is good, and organic production is also ramping up. Overall volumes are forecasted to increase in early 2026. Central Mexico continues to increase production on a weekly basis. Overall quality remains good, with solid availability across current packs. Production is underway in Florida, with volumes increasing steadily. Quality is good, featuring full color, ripe, red fruit.

**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 done out of California, and storage inventories are rapidly declining as we still see strong demand post-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 age. Green grapes are done and will need to sub to reds until consistent supply starts coming in from Chile and Peru. We do not expect significant volume and will see market volatility 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 week to 10 days.

**Blackberries:** 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 product is appearing due to recent heat, rain, and elevated humidity in the growing regions.

**Blueberries:** **WATCHLIST** Production continues in Central Mexico with good availability. Mexican quality and sizing remain very good across current packs.

## CITRUS

**Limes: WATCHLIST** 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 into the next two weeks as well as possible harvest delays due to rain in the region and Holiday delays.

## WEST COAST LETTUCE

**Iceberg: ESCALATED** Lettuce quality and supplies are okay. Weights remain light. The market is still very active. The weather has affected both harvesting and quality. The market is not escalated now but growers expect the market to rise again after the holidays. Growers are watching for soilborne diseases, and we get into the crops that were planted during the heavy rains. Cello Lettuce is still slightly escalated for next week.

**Iceberg VA: ESCALATED** Quality and supplies are good.

**Romaine VA: ESCALATED** Quality is okay, and supplies are good. The weather has affected harvesting and quality.

**Romaine & Romaine Hearts: ESCALATED** Romaine and Romaine Heart quality are okay, and supplies are good. There have been reports of bruising, mechanical damage, lightweight, fringe burns and light cupping. For the hearts, we are seeing very little heart material. The weather has affected harvesting and quality.

## EASTERN AND WESTERN VEGETABLES

**Green Bell Pepper:** Steady supply available from Coachella, Nogales, McAllen and South Florida. Quality is good. We do expect to wrap up out of Coachella next week and move completely to Nogales out west.

**Color Bell Pepper:** Still picking a few peppers out of the desert but mostly done for the season and transitioning to Nogales. Starting to see more volume crossing through Nogales on open field as well as hothouse blocky pepper. Markets expected to be firm through New Years. Quality is good on all colors.

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

**Mixed Chili Pepper: ESCALATED** Supplies will begin to increase through the month of December, which will improve quality as well as availability. We expect to see downward pressure on pricing as well. Growing conditions are optimal for Sinaloa and Sonora. We will see escalated markets on Habanero, Poblano and Tomatillo through December.

**Tomatillo: EXTREME** Due to recent weather-related pressure, we are seeing a severe decrease in fresh tomatillo crossings. In addition to the volume decreases, we are also seeing spec variations mostly related to much smaller sizing being available. For the next 7 to 10 days, we expect to see shortages and prorates on this item as well as no peeled product being available.

**Eggplant:** Domestic supply is steady out of Florida while crossing through Nogales continue to be strong. Quality coming from both regions is very nice.

**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.

**Boston/Butter Lettuce: EXTREME** Quality is okay, but supplies are tight. We have seen mildew and fringe burn pressure. The weather has affected harvesting and quality.

**Green Leaf, Better Burger and Red Leaf: ESCALATED** Quality is good and supplies have improved. We have seen mildew and fringe burn pressure. We are still seeing lighter carton weights, but things are getting better. The weather has affected harvesting and quality.

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

**Slicer Cucumbers:** Supply crossing through 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.

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

**Green Beans:** Holiday demand 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 next week.

**French Beans: WATCHLIST** Guatemalan production and quality remain good, with supplies considered fair. Mexican French bean availability is also fair, with steady production supporting current demand.

**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.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Marginal	USA
Basil	Very Limited	Marginal	USA/MEX
Opal Basil	Very Limited	Marginal	USA
Thai Basil	Very Limited	Marginal	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Limited	Marginal	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

## MELONS

We will see steady cantaloupe arrivals through next week but production in Guatemala will see a significant decrease over the next two to three weeks. With the next growing areas not set to begin until the first week of January, we are expecting to realize a decrease close to 50% of current levels. With back-to-back holiday weeks approaching this shortfall likely will not be realized until the week of Jan 5th.

**Watermelon:** Domestic watermelons are limited to Florida and winding down for the season; they will be back in production early April. First offshore arrivals are scheduled for this Friday. The supply of Mexican watermelons via Texas and Nogales has steady and quality if good. Markets are escalated and expected through New Year's.

**Cantaloupe:** We are starting to see the sizing profile almost exclusively to the 9/12s, with less than 10% of jumbo fruit being harvested. 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 over the next month or so.

**Honeydew:** Northern Mexican production has finished which put more pressure on the offshore fruit. Honeydews are expected to be tight for the next three to four weeks. Flexibility on sizing will be required during this period. Overall volume remains extremely limited. Scarring is a common characteristic at this time of the year, and mud/dirt will also be seen.



## 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 has slowed due to recent weather challenges, regional transitions, and ongoing logistical constraints. Peruvian volumes continue to build in the northern Trujillo region, while production in the southern Ica region is tapering off as the season winds down. This seasonal shift in Ica is resulting in a greater proportion of small and standard sizes. With reduced availability from Mexico and increased holiday demand, markets have become more active and remain firm.

**Bok Choy:** Quality and supplies are good.

**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: WATCHLIST** Quality is good, and supplies are still limited with most growers. The weather has affected harvesting and quality. Growers are holding to strict averages when they can, but you could see prorates as we finish out the year.

**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: WATCHLIST** Quality and supplies are good.

**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 throughout the year.

**Corn, Sweet:** Lighter supply overall out of Florida and Mexico. Markets were firmer this week 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: 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.

**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. The previous rain in the growing region in MX continues to hamper supplies. Growers are holding to very strict averages when they can but prorates should be expected for at least the next 3 weeks. Plantings for the next 6 to 8 weeks were affected by the previous rains, and yields are likely to be an issue until the end of January.

**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 (Curly, Italian):** 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 of Guatemalan snow peas and sugar snaps continues to build steadily. Peruvian production is at or near the end of the season, with volumes declining due to normal seasonal transitions. Mexican snow pea supplies remain limited as growers move through field transitions, while Mexican sugar snap availability continues to show gradual improvement.

## ONIONS:

The onion market is expected to remain stable throughout Q4. With harvest concluding, all product 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.

## TOMATOES:

### 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:** 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:** 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.

## OTHER FRUIT:

**Apples:** The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

## POTATOES:

Potato supply in 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.

## MEXICO

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

**Roma Tomatoes:** Excellent supply 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:** Supply is stable this week and quality is outstanding.

**Cherry:** Supply is steady and quality is good.

**Cherry Tomatoes:** Supply is steady and quality is good.

**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.