

Overview

Tomato production continues to fluctuate in South Carolina, Tennessee, and Virginia due to rain, while Mexico's production of Rounds and Romas remains steady. 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.

The **Lime** market will begin to ease as more volume crosses the border, with peak sizing concentrated on smaller fruit. Sizes 175 and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks.

Hot Pepper production is expected to stabilize most varieties; however, Shishito, Habanero, and Red Fresno Peppers continue to be in the shortest supply. We are still assessing the fallout of the FDA and CDC collaboration with state and local partners regarding the multistate outbreak of Salmonella Javiana infections linked to **Peppers**. We are in close contact with our grower partners, distributors, the FDA and the USDA. We will provide updates as they are provided to our team.

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** impact the industry over the coming weeks. In addition to these increases we will also see increases across the domestic supply chain which mostly impact growing and operating costs.

Celery remains escalated but supplies and quality are improving. Warm weather along with disease and insect pressure will continue to affect harvestable acreage. Growers anticipate these challenges will remain a significant factor impacting supplies throughout the season, with **Leafy greens**, **Broccoli** and **Cauliflower** being the items most likely affected. **Artichokes** and **Anise/Fennel** remain in limited supply due to ongoing supply constraints.

The **Avocado** industry was alerted Wednesday morning that the USDA would be suspending activities in Michoacan, Mexico. Without USDA inspectors on site, no packinghouse can ship avocados to the US. There is currently enough inventory in the pipeline to withstand a short-term suspension, but if this lingers into next week, we can start to see delays and prorates. Before this development, the market was stable with good supply coming from Mexico, California and Peru. The size curve still favors 60ct and smaller, larger fruit comes at a premium. California and Peru production is slowly starting to taper off but we can expect a few more weeks of good volume from both. Cantaloupe production is strong keeping pricing steady.

Honeydew volume has finally increased, and there is enough supply for the current demand level.

EXTREME						
	Artichokes		Asparagus			
ESCALATED						
	Celery Organic	Fennel/ Anise	Green Beans	Limes 175's and larger		
						
	Jalapeños	Tomatoes Grape & Cherry	White Asparagus			
WATCHLIST						
	Blackberries	Broccoli Broccolini	Brussels Sprouts	Cabbage Green	Cauliflower	Eggplant
						
	French Beans	Herbs	Small Citrus all varieties	Spinach	Potatoes	Sweet Potatoes

Berry supplies remain generally favorable, with domestic production continuing to support overall market availability despite normal seasonal transitions. California remains the primary source for **Strawberries**, **Raspberries**, and **Blackberries**. The Pacific Northwest **Blueberry** production continues to provide steady supply as Peru begins its seasonal import program. Overall Berry quality remains good; however, Strawberries are experiencing increased bruising, softer fruit, and reduced shelf life due to elevated temperatures and humidity, making tighter inventory management advisable. Market conditions are expected to remain balanced over the coming weeks, although seasonal production shifts and declining domestic volumes will gradually increase reliance on imported supplies.

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 currently stable. Please consider imported citrus this summer, as it will help relieve strained sizing, particularly for East Coast demand.

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.

FRUITS & VEGETABLES

Avocados: Mexico sent 44.9 million pounds to the U.S. last week, average dry matter is 26.9%. California harvested 9 million pounds and has an average dry matter of 30%. Peru sent 9.5 million pounds with dry matter around 25%.

Table Grapes: We have completely transitioned to 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, 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 and there may be supply issues on the back end of the season.

Bananas: Banana supply will be stable, but production 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: In the coming weeks, Pineapple supplies will tighten up due to the natural flowering process. Contract volume should hold firm, but open market availability will drop, causing pricing to increase. Suppliers are expecting this to last for 4 to 6 weeks. This should not affect quality, which has been good. In the meantime, supply exceeds demand, keeping market pricing stable.

BERRIES

Strawberries: Strawberry supplies remain adequate despite the expected seasonal decline in volume, with Watsonville and Salinas continuing to provide the majority of production. Overall quality remains relatively good; however, elevated temperatures and humidity have resulted in increased bruising, softer fruit, and reduced shelf life, making tighter inventory management advisable. Santa Maria's organic season continues to build with improving size and color, while conventional production is expected to begin around Week 33. Overall availability should remain sufficient as production transitions between growing regions.

Blackberries: **WATCHLIST** Blackberry supplies continue to improve as Watsonville production gains momentum, offsetting lighter volumes from Mexico. California fruit quality has improved following recent weather, with peak production expected from mid-to-late August into early September. Mexican production remains limited through August due to weather-related quality challenges, but supplies are anticipated to strengthen heading into September.

Blueberries: Blueberry supplies remain stable as Pacific Northwest production continues with good quality and steady harvest volumes. British Columbia, Washington, and Oregon remain the primary domestic production regions, while the first Peruvian arrivals are expected next week. Peruvian quality is reported as excellent, although import volumes will remain limited through August and September.

Raspberries: Raspberry supplies remain favorable, supported by strong production from Watsonville and continued availability from Mexico. Mexican fruit continues to offer good color, firmness, and flavor, while Watsonville production has entered its seasonal peak with excellent overall quality. Although Mexican volumes are expected to gradually decline through August before rebounding in September, California production should provide ample support over the coming weeks.

CITRUS

Limes: **ESCALATED** Supply continues to improve despite heavy rains in Mexico; however, sizing issues continue on fruit out of Mexico and other regions across Central America. The size distribution will continue to skew heavily toward 230s and 250s. Unfortunately, this is leaving larger sizes. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next few weeks.

Lemons: 140/165/200's are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve.

Navels: Finishing up, some suppliers are completely finished with Navels.

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

Mandarins: Mandarins are finishing up and imports are coming in. Be in contact with your supplier on other varieties or imports as alternative options.

Grapefruit: California Grapefruit available!

WEST COAST LETTUCE

Iceberg: Lettuce quality and supplies are good. We have seen some reports of internal burn.

Iceberg VA: Quality and supplies are good.

Romaine VA: Quality is good and supplies are improving. We are still seeing more core in the bags and some mildew.

Romaine & Romaine Hearts: Supplies and quality are good. Romaine Hearts remain at the extreme level.

Boston/Butter Lettuce: Quality and supplies look good.

Green Leaf, Better Burger and Red Leaf: Quality and supplies are good.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Supply is steady out of California; lighter supply out of the East due to ongoing rain and quality issues.

Color Bell Pepper: Good supply is available out of Filmore/Somis, Baja, and South Georgia this week. Quality is outstanding on open-field varieties. The Hothouse Pepper category is steady out of Canada and Mexico. Overall quality is good.

Jicama: Stable supply and good quality available.

Mini Sweet Pepper: Supply will be stable over the next week. Quality remains good.

Mixed Chili Pepper: **ESCALATED** Supplies are stable on most varieties. Decent numbers are crossing from Mainland Mexico, Baja and local programs in California as well as the East Coast. We are still assessing the fallout of The FDA and CDC collaboration with state and local partners regarding the multistate outbreak of Salmonella Javiana infections linked to Jalapeño peppers. We are in close contact with our grower partners, distributors, the FDA and the USDA. We will provide updates as they are provided to our team.

Tomatillo: Good supply and quality available this week.

Eggplant: **WATCHLIST** Central Valley is now in full production out of California. Quality is fair. We are mostly seeing Choice available, with #1 Fruit being limited. Local programs in the east: Tennessee, North Carolina and Michigan- Limited this week.

English Cucumbers: Excellent supply out of Canada, Nogales and McAllen. Quality is good.

Slicer Cucumbers: Supply crossing through Nogales and McAllen will tighten up as the season starts to close. In the east we are seeing good supply out of Florida and South Georgia. Quality is good from all shipping points.

Pickles: Lighter supply available out of South Georgia, Florida, and Mexico. Quality is good.

Green Beans: **ESCALATED** Lighter supply out of South Georgia and Kentucky in the East. In the West, Orange County and Baja supplies are limited. Quality remains mixed; good in the West and mixed in the East.

French Beans: FA slight decrease from Guatemala is expected. However, the supply should improve in two weeks. A good supply of French beans is expected out of Mexico.

Zucchini/Yellow Squash: Steady lighter this week on Green and Yellow Squash out of Michigan, Virginia and California. Markets were higher as demand came in a bit heavier than expected. Quality is good.

MELONS

Watermelon: The market has improved since new growing areas out in the east and north started harvesting. Production in the West has also increased but is still below levels from last year. Pricing has become steady as there are more supplies. Suppliers are reporting good quality throughout the growing regions.

Cantaloupe: Production remains strong as we start to hit peak summer season. The valley is bracing for temperatures between 105-108 degrees next week which could limit harvest time. Quality has been fantastic, an excellent flavor profile and strong color. Fields are currently producing more 9s, while 12/15s are limited.

Honeydew: Volume has improved greatly over the past two weeks. Sizing still favors 5s, 6s are limited, and 8s are hard to find. Suppliers are asking for flexibility on sizing. Overall, the quality has been good with high brix levels.

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, lemon thyme, and marjoram remain limited due to heat.

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

ONIONS: Washington has started harvesting helping take some pressure off the issues off both New Mexico and California. Overall, the market is still struggling to keep up with demand, keeping open market pricing elevated. As we get more production from the Northwest, the market will begin to stabilize.

POTATOES: **WATCHLIST** The market has strengthened as the size profile has shifted to finish out last year's crop. Suppliers are seeing a shift in the size profile toward smaller count sizes, 70-120ct, while 40-60ct have become tighter. Suppliers are watching inventories closely to make sure there is enough to last until new crop and to monitor quality issues. Shippers are requesting additional lead time and some flexibility on sizing when possible. Suppliers are covering programs and consistent customers.

SWEET POTATOES: **WATCHLIST** The sweet potato market remains tight as we move into the final stretch of the 2025 storage crop. Limited supplies remain available nationwide, particularly on premium U.S. No. 1 grades and larger counts. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market. North Carolina and Mississippi growers are reporting lighter yields and tighter availability due to weather-related challenges from last season. Quality remains generally good; however, some lots are showing increased cosmetic defects and shrink tied to weather stress from last growing season. New crop harvest is expected to begin in limited volumes during August, with broader availability arriving in September. Suppliers are covering programs and consistent customers.

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. 12ct's remain at the extreme trigger.

Asparagus: EXTREME The asparagus market remains extremely active, with demand far exceeding supply. Most of the production is currently coming from Northern Peru, which will remain the primary growing region through August. Beginning in late August/early September, production will gradually shift to Peru's southern growing regions. Production in Mexico remains very light and is expected to stay that way for the remainder of the month. With limited volumes available from Mexico, the market continues to rely heavily on the lower Peruvian production.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality and supplies are good. A few reports of browning and pin rot continue. Organic Crowns remain at the extreme level. With insect pressure increasing, we will keep this item on the watchlist.

Brocolini and Sweet Baby Broccoli: WATCHLIST Quality is good, but supplies are limited.

Brussels Sprouts: WATCHLIST Quality and supplies have improved.

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

Cauliflower: WATCHLIST Quality and supplies are good. With insect pressure increasing, we will keep this item on the watchlist.

Celery: ESCALATED Quality and supplies have improved. Disease pressure is still a factor, especially on organic celery but overall quality and supplies look good. Organic Celery is still at the extreme level.

Corn, Sweet: Light supply and firm markets will continue out of South Georgia, Virginia, Illinois and North Carolina in the East and California, Oregon and Washington out West. We expect to see demand stay strong and prices will be firm over the next week. Quality is good out of all regions.

Fennel: ESCALATED Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Growers are holding to averages.

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 market are steady.

Green Cabbage: WATCHLIST Supplies and quality are good.

Green Onions: Supplies and quality are good.

Mushrooms: Supply is expected to be steady 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 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 have improved.

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

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: Quality looks good, but supplies are light.

Spinach: WATCHLIST 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. We are adding this item to the watchlist.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: Snow pea supplies remain limited across both regions. On the East Coast, Guatemalan snow pea supplies are extremely limited, while sugar snap supplies remain plentiful. On the West Coast, domestic snow pea supplies are limited, while domestic sugar snap supplies are fair, reflecting stronger imported availability in the East and tighter domestic conditions in the West.

TOMATOES: MEXICO

Round Tomatoes: Supply will remain snug on larger-sized fruit this week. Quality is outstanding on what is crossing this week.

Roma Tomatoes: Excellent supply and quality available out of Jalisco and Baja.

Grape Medley, Grape and Cherry Tomatoes: 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.

TOMATOES: CALIFORNIA

Supply is steady across the Golden State! Crops look amazing; we expect a great California season on vine ripens as well as mature greens.

OTHER FRUIT:

Apples: As we move through the summer storage season, Washington apple inventories continue to trend below both last year and historical averages across many key varieties, supporting the firm pricing environment that has developed throughout 2026. According to the most recent storage reporting, total conventional apple inventories stood at 39.4 million cartons, down 12% from 44.9 million cartons last year and slightly below the three-year average of 40.4 million cartons. The market will remain elevated until new crop apples start in August.

Pears: D'Anjou availability is tight and primarily limited to U.S. #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 U.S. #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.

DAIRY:

Butter/AMF/cheese generally faced downward pressure across the major exporters this year. Estimated butter stocks in Europe still look very heavy despite weakening production while everyone seems to have cheese to sell. NFDM/SMP did catch a bid, if GDT SMP fails to increase next week, the rally could fade quickly. Preliminary June milk production for EU countries have been coming in stronger than expected, but my guess is that will be revised down. Hot and dry weather (along with wildfire smoke) is having a negative impact on milk production across parts of the Northern U.S. and swaths of the EU. Geopolitical risks to input costs (feed, energy) continued to increase this week.

TOMATOES: EAST COAST

Round & Roma Tomatoes: Volume remains light this week out of Tennessee and North Carolina, mostly due to rain delays. Quality is mixed out of all regions. Small fruit is short, possibly requiring size substitutions.

Snacking, Grape Medley, Grape and Cherry Tomatoes:

ESCALATED Lighter volume this week on grapes, medley, and cherries due to transition. Quality is fair at best.

Pomegranate: Limited supply out of Mexico.

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

Cherries: Season is coming to an end. .

Stone Fruit: Steady supply out of California and other local regions.

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

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

Mangoes: Steady supply out of Mexico, Peru and Puerto Rico. Varieties: Tommys, and Ataulfo.

Kiwi Fruit: Supplies are fair out of Chile.

Quince: Limited supply available this week.

SHELL EGGS:

National FOB shell egg weighted average prices are about steady to lower for the heavier weight caged eggs, while higher for Medium. The undertone is steady to at times weak. Retail demand is generally moderate. Loose egg demand is light to moderate. Offerings are light to moderate. Supplies are mostly moderate. Market activity is moderate. California weighted average delivered prices are mixed on limited trading. The undertone is firm for Jumbo, steady to weak for the balance of sizes. Retail demand is seasonally moderate to light. Food service demand is light. Offerings are light for Jumbo, moderate for the remainder of classes. Supplies are moderate to at times light. Market activity is slow to moderate.

PROTEIN:

Beef: With the opening of the Mexican border comes the realization that feeder cattle crossing into the U.S. will not be market-ready for several months, so there is no immediate impact on available cattle supplies. A few cattle traded at steady money on Monday. Ground beef demand is reportedly lackluster, which has reduced demand for end cuts used as grinding material. Middle meats remain in a holding pattern as the industry awaits Labor Day demand. Load counts were higher from Monday to Tuesday this week, so buyers are beginning to step into the market.

Pork: Continued weakness is expected in hams in the short term. Bellies continue to be the star performer within the cutout, as bacon demand remains in full swing. Falling hog weights are also providing support to trim markets. The harvest should be near 2.3 million head and hog prices are called steady for the week.

Loin are expected to remain steady, while butts and ribs should see improved demand as Labor Day buying activity approaches.

Turkey: Frozen 8-16 lb. hens and 16-24 lb. toms steady. Demand light. Offerings light. Frozen commodity Grade A 8-16 lb. hens offered at 173-188 and 16-24 lb. toms at 175-188 cents FOB for current shipments.

The market on white meat and white trim is steady. Demand is light. Offerings of fresh white meat are light. Frozen white meat and white trim offerings remain light. Cooked and deli demand light. Grade A consumer sized breasts, institutional sized breasts are steady. Tom drums, full-cut, and type wings are steady to weak with the balance of bulk parts mostly steady. Demand light to instances moderate. Offerings short to light. The thigh meat market is steady. Demand light. Offerings very light to light. Defatted gizzards, hearts and livers steady to barely steady. Demand and offerings light. Tails steady. Demand and offerings light. Tom necks weak with demand very light. Mechanically separated turkey (MST) market is weak. Demand is light for both fresh and frozen. Offerings light to moderate with fresh the most available. Trading slow.

Smoke and excessive heat continue to impact beef demand across many Western states. Harvest expectations for this week are 510,000 to 515,000 head as packers demonstrate discipline in supporting cutout values. Grading percentages are declining seasonally, as evidenced by the chart below, and the Choice-Select spread is expected to widen moving forward.

Chicken: WOGs are just about steady with moderate offerings for the 3-4lbs sizes. Floor stocks are adequate. Demand is moderate to good. Bone-in breasts, front halves right now are still discounted. Searching for more buyer interest. Tenders are discounted as well, leaving some wiggle room for asking prices. Wings are sitting well balanced. Leg and thigh prices remain steady as buyers focus on the cost. The market is steady.

Export markets are steady.

EXPORT MARKET HIGHLIGHTS

Trading slow. Market steady to weak. Demand light. Offerings light to moderate.

