



OVERVIEW:

The market is characterized by widespread transitions and weather-related volatility. South Georgia is nearing the end of its harvest for Zucchini, Bell Pepper, Corn, and Cucumber, while the industry watches a severe cold front that could prematurely terminate the season in South Georgia and North Florida. Tomato production is concurrently shifting, with Florida gaining momentum as South Georgia maintains steady output, complementing the ramp-up underway in Nogales. Grape season is concluding in California, with supply moving offshore. Melon supply from Firebaugh is largely finished, with Yuma production tight due to rain and lower-than-expected yields. Limited Pineapple availability persists, requiring flexibility on sizing from shippers. The Salinas season is rapidly approaching its end amidst persistent issues with quality (pin rot, decay, larvae) and low yields, driven by soil diseases, insect pressure, and sporadic weather. This limited supply is escalating prices for many commodities. Severe shortages are expected across all Lettuce varieties (Romaine, Hearts, Red/Green Leaf, Boston/Butter), Cauliflower, Broccolini, Snow Peas, and Sugar Snap Peas, with these markets remaining at extreme levels. Tight supplies and high markets continue for Brussels Sprouts, Fennel/Anise, Artichokes (small sizing), Broccoli, Bok Choy, Celery, Spring Mix, Arugula, and Cabbage. Further, vessel delays on the East Coast and weather issues in Guatemala are severely disrupting the movement and quality of Snow Peas, Sugar Snap Peas, and various Baby Carrots and French Beans. Growers expect rain in Oxnard and Santa Maria next week, potentially delaying berry harvests, which will be mitigated by supplementing supply from Central Mexico, leading to temporary changes in pack-outs. Looking ahead, significant supply and quality disruptions are expected as the industry navigates the bumpy transition to winter production, exacerbated by unusual rain in the Yuma region. In the avocado sector, US volume modestly stepped down to 57.4 million pounds, with Mexican fruit maintaining a stable flow of 54.7 million pounds despite recent road blockages. California is rapidly finishing up. The new Citrus program for 2025–2026 has commenced, though rain predicted in Dinuba may temporarily halt harvesting. Navels are peaking on medium sizes (72s/88s), with large fruit expected to tighten. CA Pink Grapefruit is concluding as Texas/Desert Rio volume slowly begins. Lemon supply is improving on small sizes (165s+) with harvest in Districts 1 and 3 providing good availability across the size spectrum. California Mandarins are starting slowly, preceding the ramp-up of Cara Caras and Bloods in December. Finally, California Garlic supplies are currently reported as good.

ALERT LIST:

ESCALATED

Asparagus, Artichokes, Arugula, Blackberries, Bok Choy, Broccoli Florets/Crowns/Asian Cut, Brussel Sprouts VA, Cabbage Green/Shredded, Celery/Celery Sleeved, Cilantro, Hot Pepper (Anaheim, Tomatillo, Serrano, Caribe and Red Fresno), Kale, Leeks, Napa, Spring Mix, Strawberries, White Asparagus, Fennel/Anise.

EXTREME

Boston/Butter Lettuce, Broccolini, Brussels Sprouts, Cauliflower, Green Leaf, Lettuce Iceberg, Lettuce VA Blends/Better Burger, Red Leaf, Romaine/VA Blends, Romaine Hearts, Snow Peas & Sugar Snap Peas.

WATCH LIST:

Blueberries, Red Cabbage, French Beans, Green Onions, Herbs, Pineapple, Ginger, Spinach, Cantaloupe, Honeydew

BERRIES



Strawberries

Demand exceeds supply, making November the tightest and highest-priced period, with relief not expected for 3–4 weeks. Salinas/Watsonville production is ending, and the seasonal decline is not offset by ramping volume and strong quality from Central Mexico (CMEX) and Southern California. Rain is forecast for Oxnard and Santa Maria next week.



Blackberries

Supplies have improved due to steady increases from CMEX and Baja, alongside active Watsonville production. However, quality remains inconsistent with some reports of color reversion, soft, or overripe fruit linked to recent regional heat and humidity.



Raspberries

Supplies tightened following rain and the seasonal decline in Oxnard and the end of the Watsonville season. Production continues in CMEX, Baja, and Oxnard with good overall quality, though soft/overripe fruit is noted due to recent weather.



Blueberries

Supplies are steady. Active production and good quality/sizing from CMEX are well-balanced by strong imports from Peru, contributing to market stability.

CITRUS



Lemons

Small sizes (165s and smaller) remain a challenging, tight commodity as most crops are producing larger fruit.



Limes

Supply is steady across all sizes, but expect mixed quality over the next few weeks.



Specialties

Blood Oranges, Cara Caras, Minneolas, and Mandarins are nearly finished for the season. Grapefruit is available, though Fancy grade is light. Blood Oranges are running small.

WEST COAST LETTUCE



Iceberg & VA

- Iceberg: Extremely limited supply. Severe prorates. Fair quality: INSV, light weight, ribby. High market. Weather harms harvest/quality. Rain expected: near-term gaps. Yields declining to transition.
- Iceberg VA: Tight supply/prorates. Fair quality. Weather hurts harvest/quality. Yields dropping to transition.



**Romaine,
Hearts & VA**

- Romaine & Hearts: Extremely tight supply. Market climbing (high demand). Fair quality: bruising, damage, fringe burn, light cup, pest/disease. Minimal heart material. Severe prorates. Weather harms harvest/quality. Yields dropping to transition.
- Romaine VA: Extremely limited supply. Severe prorates. Acceptable quality. Weather harms harvest/quality. Yields dropping to transition.



Green & Red Leaf

Extremely constrained supply. Prorates expected. Fair quality: mildew, fringe burn, light weights. Weather harms harvest/quality.

MELONS



Cantaloupe

Guatemala harvest started; arrivals expected next week. Sizing heavy on 9s, some 12s. Good quality, firm fruit (11-14% brix). Shippers moving to different offshore ports.



Honeydew

Available domestically/from Mexico. Sizing heavy on \$5\$s and \$6\$s. Nogales volume increased, easing market. Scarring/mud common seasonally.



Watermelon

Domestic supply shrinking (both coasts), driving prices up. Mexico supply constrained by production issues (past rain).



TOMATOES – USA



Round & Roma

Round: Supply ramping up (Ruskin/Palmetto). South Georgia stable. Good quality. Roma: Supply ramping up. Quality mixed; should improve as Florida volume increases.

**Snacking (Cherry,
Grape, Medley)**

AMPLE supply from summer programs, transitioning to South Georgia/Florida next week. Outstanding quality.

California

California volume is mostly done for the season due to weather.



TOMATOES – MX



Round	Steady volume (McAllen/Otay). Good quality.
Roma	Volume improving (McAllen/Otay). Good quality.
Grape	Excellent supply. Weak demand lowers price. Good quality.
Cherry	Most volume crossing from Baja. Very good quality. Demand flat.
Mixed Medley	Good supply (McAllen/Otay). Mostly good quality.
On the Vine	Stable volume available this week.

FRUITS & VEGETABLES



Avocados

The U.S. received 54.7 million pounds from a \$59.9 million-pound harvest last week. Mexico's Jalisco region contributed 6.8% of this volume. Both the Main Crop (70.2% of volume) and Off-Bloom Crop show consistent sizing, peaking on 48s and 60s, with dry matter for both over 28%. Wet season rain has resulted in an expected presence of Lenticel (small external brown spots), which does not affect internal quality. APEAM continues to enforce the minimum 23% dry matter standard for harvest. California volume is minimal (last week's harvest was 2.6 million pounds, peaking on 48s and 60s) and the season is expected to conclude this month.



Bananas

Supply is stable, and quality is excellent despite high demand from schools ramping up.



Pineapple

Supply will remain severely restricted for the next year or more due to sustained low production in Central America (drought, poor yield, and reduced acreage). While contracts are secure, flexibility on sizing is essential to maintain supply chain stability. Quality and flavor are good.



Table Grapes

California's fall production is winding down, driving pricing higher due to consistent demand. Expect mixed quality, including increased shatter, waterberry, and reduced shelf life as the fruit ages. Green varieties are very limited, while Red (Autumn Royals, Scarlets, Globes) and Black (Sweet Sapphire) varieties (Autumn Kings, Autumn Crisp) remain available. Storage fruit is anticipated to begin moving by mid-November.



Green Bell Pepper

Steady supply, all regions. Good quality.



Color Bell Pepper

Steady supply, all regions. Good quality.



Eggplant

Domestic (Fresno/S. Georgia) supply steady, good quality. Mexico crossings ramping up.



Cucumbers

Slicer: Border crossings (Otay/Nogales/McAllen) may be lighter due to Baja/Sonora rain delays. Domestic (S. Georgia) stable. Good quality all regions. English: Light supply this week. Good quality.



Green Beans

Mixed supply/quality. Light demand. Weather impacting most regions.

French Beans

Guatemala production good, quality improving. Mexico supply fair.



**Zucchini/
Yellow Squash**

Mixed supply. West is plentiful; Southeast struggling (transition). Split markets: East is mid-teens, West is single digits. Cold front could widen this gap.



Fresh Herbs

Overall steady supply/good quality. Basil strong (Mexico/Colombia), but heat-related quality issues noted. Chervil limited (Ecuador weather). Sage remains tight (weather issues).



Artichokes

Limited supply, good quality. Growers holding averages; size substitutions possible. Large sizes are extremely tight.



Asparagus

Mexican small sizing (Hermosillo) improving; large sizes tight. Peruvian volume/sizing improving. Markets stabilizing as standard product increases.



Bok Choy

Limited supply, good quality. Light supply drives market.



Borccoli/Crowns

Limited supply, okay quality. Browning, Pin Rot, Larvae reported. Most growers prorating. Quality/yields affected by Salinas season end; expected to improve once Yuma transition is complete in a few weeks. Organic is still EXTREME. MX Broccoli is better with good yields.



**Broccolini/Sweet
Baby Broccoli**

Extremely tight supply, fair quality. Growers prorating (some only covering 50% of average). Extreme pricing. Weather harmed harvest/quality, increasing supply issues.



Brussel Sprouts

Extremely limited supply. Yield struggles continue; early pulls mean waits for new crops. Insect pressure/internal browning noted; quality okay. Extreme market. Prorates seen.



Carrots

Steady supply from Monterey/Kern. Good jumbo sizing. Quality good; expected to improve as harvest moves to Lancaster/Cuyama (through November). MX volume decreasing seasonally and due to local market emergence (Canada). Production strongest in Guanajuato/Puebla.



Cauliflower

Extremely tight supply, fair quality. Growers battling pests; holding averages; prorates starting. Extreme market. Weather harmed harvest/quality, increasing supply issues.



Celery

Extremely tight supply, good quality. Fall pull/high demand (schools/football) driving prices up. Organic is EXTREME.



Corn

Lighter supply in West; strong out of South Georgia. All new crop; good quality.



Fennel

Lower yields cause supply shortage. Pricing stays escalated until supply improves. Some prorates seen (growers holding 8-week averages).

FRUITS & VEGETABLES



Kale

Limited supply, okay quality.



Leeks

Okay supply/quality.



Garlic

Season ending; new crop starting. Supply expected to improve. Quality good; availability held to current commitments until crop assessed.



Ginger

Steady supply and market.



Green Cabbage

Extremely tight supply, okay quality. Poor yields in VA Cabbage (limiting core). Growers starting to hold averages. Weather harmed harvest/quality. Yields declining to transition.



Green Onions

Supply highly inconsistent. Quality okay.



Mushrooms

Lighter volume (summer production ending). High demand/holiday pull expected to shorten supply further. Quality good.



Napa Cabbage

Quality/supply improving, but insect pressure noted.



Parsley

Good supply/quality.



Red Cabbage

Light supply, good quality.



Spinach

Supply limited for some growers. Okay quality; reports of weak texture, discoloration, wilting, insect damage, and heavy mechanical damage (due to brittle texture). Weather severely impacted harvest/quality, worsening supply.



**Snow Peas &
Sugar Snaps**

Extremely limited supply. Guatemala impacted by adverse weather (little improvement expected until mid-November). Peruvian/domestic volumes low. High demand exceeds low supply. Mexican production started but volume is insufficient.



Onions

Market expected to remain stable and favor buyers through Q4. Supply ships exclusively from storage (Pacific Northwest). No significant market change or major price increases expected. Plentiful availability projected.



Potatoes

Supply fully supported by storage shipments; no major challenges. Strong sizing/availability across all categories. Burbanks start shipping mid-October in limited volume (Norkotahs dominant). Long-term outlook soft until late spring.