



OVERVIEW:

A major freeze in South Georgia has ended its season for all crops, forcing an immediate transition to South Florida for items including corn, cucumber, and green bell pepper. Production is now intensifying in Ruskin and Immokalee. South Georgia and Quincy are done with tomatoes. Expect firmer markets this week as the cold slows production, but a market recovery is forecast within ten days. Adverse weather is the primary concern nationwide. Multiple consecutive days of heavy rain are predicted for California's berry regions, likely delaying harvests, causing prorates, and leading to order cancellations. Rain is also expected in Salinas, Yuma, and other key Western regions, complicating harvesting efforts and adding to existing supply chain issues. A strong winter storm in Coachella this weekend may impact vegetable output and delay bell pepper loading. Central Mexico is now supplementing the berry supply, which may involve temporary changes to pack styles. Supply volumes are extremely limited across several commodities, pushing markets to an extreme level. This includes Sugar Snap Peas, Snow Peas, Boston/Butter, Red Leaf, Green Leaf, Broccolini, Cauliflower, Lettuce, Romaine, and Romaine Hearts. Brussels Sprouts and Celery supplies are also critically tight, likely leading to prorates approaching the holiday season. The escalation is driven by low yields and quality issues, including pin rot, mildew, and light weights. These shortages are expected to persist through November. Transition challenges are ongoing, leading to significant quality and yield issues overall. In the East, vessel delays and poor weather in Guatemala are restricting availability and quality for products like snow peas and French beans. In the West, product crossing through Nogales is improving; Tomatoes begin crossing in about four weeks (starting with Romas), and Bell Peppers in three weeks. Grape season in California is concluding, shifting offshore. Import cantaloupes have started with slow offshore volume movement in Yuma. Pineapple availability is highly restricted, requiring flexibility on sizing. Citrus harvest is paused for nearly a week in the Central Valley due to rain, which will cause tight availability. Navel sizing is medium-peaking (72s/88s), with larger fruit potentially tightening. California Mandarins are starting slowly. Texas/Desert Rio Grapefruit has begun. Lemon harvest is underway, heavy to fancy. California garlic supplies are reported as good. Avocado supply is stable, supported by retail promotions and lower pricing. Mexico shipped 53.9 million pounds to the U.S. in week 45. Consistent sizing is observed, peaking on 48s and 60s. Chile and Colombia are contributing limited volume.

ALERT LIST:

ESCALATED

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

EXTREME

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

WATCH LIST:

Blueberries, Cabbage (Red), French Beans, Green Onions, Herbs, Pineapple, Ginger, Spinach, Southeastern Veg (Bell Pepper, Squash, Cucumber), Melons (Cantaloupe and Honeydew)

BERRIES



Strawberries

Forecasted rain from Thursday through Monday in Oxnard and Santa Maria presents a major challenge. Growers are attempting to harvest ahead of the storms to mitigate losses. While Oxnard quality is currently strong, the rain will likely result in lighter coloration, more white shoulders, and greater size/shape variance. Central Mexico (CMEX) production is increasing but not fast enough to meet demand or offset California's seasonal decline. Early CMEX fruit quality has been excellent with clean packs.



Blackberries

Production is active in CMEX and Baja. Quality is good overall, but recent periods of rain, heat, and humidity have caused some instances of soft fruit and minor red cell or color reversion. Growers are actively managing field conditions.



Raspberries

Production continues in CMEX and Baja, with improving availability. Quality is generally good, though heat, rain, and high humidity have led to some occurrences of soft or overripe fruit. Harvest schedules are being adjusted to maintain consistency.



Blueberries

Production is active in CMEX, providing steady supplies. Fruit quality and sizing are very good due to stable growing conditions.

CITRUS



Lemons

Availability is now good across all sizes, with strong supply on small sizes. Harvesting is active in both District 1 and District 3, ensuring widespread supply.



Limes

Supply is steady across all sizes, although mixed quality is expected over the next few weeks.



Specialties

Blood oranges and Cara Cara oranges are projected to start in mid-December. Be aware that rain could delay the Cara Cara start. Blood oranges may initially lack the typical exterior "blush" color upon release in December, though the internal color will be present; the classic exterior color is expected to develop more fully by mid-January.

WEST COAST LETTUCE



Iceberg & VA

Supply is critically tight, leading to extreme prorates. Quality is fair, characterized by lighter weights, ribby texture, and persistent detection of INSV (Impatiens Necrotic Spot Virus).



**Romaine,
Hearts & VA**

Supplies are extremely limited, pushing the market higher due to strong demand. Growers are applying extreme prorates. Quality issues include bruising, mechanical damage, fringe burns, light cupping, and a lack of heart material in the hearts category.



Green & Red Leaf

Supply is exceptionally tight, with expected prorates and continued high market pressure. Quality is fair to okay, showing signs of mildew, fringe burn, and lighter carton weights.

MELONS



Cantaloupe

Import sizing favors 9-counts, with some 12-counts being packed. Quality is good, featuring firm fruit and high brix (11–14%). Some customers will transition to loading offshore product at alternative ports as availability shifts.



Honeydew

Supply is sourced from domestic and Mexican suppliers (via Nogales). Sizing is heavily concentrated on 5- and 6-counts. Increased Mexican volume through Nogales has eased market pressure, but surface scarring, mud, and dirt are characteristic of this season.



Watermelon

Domestic supplies are available on both coasts, but prices are trending upward due to reduced supply. Mexican supply (via Texas and Nogales) is restricted following production issues caused by rain last month.



TOMATOES – USA



Round & Roma

Round: Supply is increasing from Ruskin and Palmetto. Markets firmed up this week but are expected to decline as production rises over the next ten days. Sizing is peaking on larger fruit. Quality is good. Roma: Light supply and higher holiday demand have raised prices. The cold weather eliminated Quincy and Georgia production and slowed Ruskin output for another 7 to 10 days. Overall quality is mixed but should improve as Florida volume increases.

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

Supply tightened this week due to cold weather. No improvement is expected until after Thanksgiving. Quality will be mixed.

California

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



TOMATOES – MX



Round	Volume crossing through McAllen and Otay is steady. Quality is good.
Roma	Light supply crossing through McAllen and Baja this week due to cooler weather. This, combined with high holiday demand, has increased prices. Production slowed due to cold and is expected to recover late next week. Overall quality is good.
Grape	Lighter supply + increased demand from the East has caused upward price movement. Quality is good.
Cherry	Most volume is crossing from Baja, with very good quality. Demand is flat.
Mixed Medley	Good supply crossing through McAllen and Otay. Quality is mostly good.
On the Vine	Stable volume is available this week.

FRUITS & VEGETABLES



Avocados

Supply remains stable, with the U.S. receiving 54.7 million pounds from a 59.9 million-pound Mexican harvest (Week 44). Jalisco contributed 6.8% of the U.S. shipment volume. Both the main crop (70.2% of total harvest) and off-bloom crop exhibit consistent sizing, peaking on 48s and 60s. Lenticel (small brown spots on the skin caused by rain) is present but does not affect internal quality. Mexican regulators continue to enforce a minimum dry matter standard of 23%. Minimal California harvest (peaking on 48s and 60s) is expected to conclude this month.



Bananas

Supply is stable and quality is currently strong despite high demand driven by school programs.



Pineapple

The market is stabilizing but remains constrained. High demand is maintaining steady pricing. Contracts are holding, but flexibility on sizing is essential to maintain supply chain stability. Quality and flavor are good.



Table Grapes

Fall production in California is winding down, causing steadily rising prices. Quality is expected to be mixed for the remainder of the season, showing signs of aging such as shatter, waterberry, and reduced shelf life. Green varieties are very scarce, while red (e.g., Autumn Royals, Scarlets, Globes) and black (e.g., Sweet Sapphire) varieties (e.g., Autumn Kings, Autumn Crisp) are readily available.



Green Bell Pepper

Supply is steady, sourced from Coachella and South Florida. Georgia's production is wrapping up early due to the recent freeze. Green bell peppers from Sonora are expected to begin crossing in three weeks. Quality is good.



Color Bell Pepper

Supply is steady from Coachella and Mexican crossings for blocky varieties. Shortages are anticipated in the East until Florida begins harvesting its field-grown red supply. Quality is good.



Eggplant

Domestic supply is steady from Fresno and South Georgia, with good quality. Mexican crossings are scheduled to increase this week.



Cucumbers

Slicer: Supply crossing via Otay, Nogales, and McAllen may be lighter this week due to weather-induced harvest delays in Baja and Sonora. Domestic supply is rapidly shifting to South Florida as Georgia's crop was significantly impacted by the freeze. Quality is currently good across all regions. English: Steady supply crossing through Nogales and Canada this week, with good quality.



Green Beans

Supply is steady for the holiday pull, sourced from Florida and Nogales crossings.

French Beans

Mexican growers are offering fair availability on French beans, providing some stability in this specialty category.



**Zucchini/
Yellow Squash**

Supply and markets are anticipated to be mixed due to the Eastern cold potentially interrupting availability during the holiday pull, as Georgia's season ends. Supply will remain steady via Nogales and McAllen crossings, with demand quickly shifting to South Florida for winter production.



Fresh Herbs

Availability is steady with good quality, though quality variation may occur based on field conditions. Basil supply is strong from Colombia and Mexico, but some heat-related quality issues have been reported. Imported chervil supply is limited due to weather affecting Ecuadorian production. Sage remains tight due to weather challenges.



Artichokes

Supplies are limited; large sizes are extremely tight. Quality is good, but prorates and size substitutions are expected as growers adhere to averages.



Asparagus

Mexican supply (Hermosillo) is consistent for smaller sizes, but large sizes are restricted. Peruvian volume is improving despite continued delays in arrivals. The market is becoming less active as standard-sized Mexican product is more available.



Bok Choy

Limited supplies are driving market prices, though quality remains good.



Borccoli/Crowns

Supply is limited, and quality is fair. Issues like browning, pin rot, and larvae are reported from final Salinas fields; some prorating remains. Mexican supply is improving with good yields. Transition to Yuma is starting and should bring market relief soon. Organic Broccoli is at the Extreme level.



**Broccolini/Sweet
Baby Broccoli**

Supplies are extremely constrained; quality is fair. Prorating is severe, with some growers covering only 50% of historical averages. Weather and transition challenges are driving the extreme pricing.



Brussel Sprouts

Supplies are extremely limited. Growers face yield struggles and gaps as early-pulled fields catch up. Quality is fair, but insect pressure and internal browning are reported. Extreme market pricing requires strict adherence to averages and ongoing prorates.



Carrots

Supplies are steady from Monterey/Kern Counties, with good jumbo size. Quality is good and will improve as harvest shifts to Lancaster and Cuyama (through November). Mexican volume is decreasing due to seasonal factors and local Canadian markets; production is concentrating in Guanajuato and Puebla.



Cauliflower

Supplies are tight, and quality is fair. Extreme market pricing is driven by weather, transition challenges, and growers battling insect pressure in Salinas fields. Prorates are in effect.



Celery

Supplies are extremely tight, despite good quality. Prices are trending upward due to rising holiday and football season demand.



Corn

Western supply is lighter; Florida and Georgia supply is steady. All available crop is new and of good quality.



Fennel

Supply is short due to lower field yields, keeping pricing escalated until volume recovers. Prorates are being enforced by some growers adhering to 8-week averages.

FRUITS & VEGETABLES



Kale

Supplies are limited, and quality is fair.



Leeks

Supply and quality appear stable.



Garlic

The 2024-2025 California season is ending, and the new crop harvest has begun, suggesting future supply improvement. Quality is currently good, but initial availability is restricted to existing commitments until the new crop is fully assessed.



Ginger

Supply and market pricing are steady.



Green Cabbage

Supplies are improving but remain tight. Quality is good, though weather and transition are still impacting harvest and quality, potentially causing supply disruptions. Some growers are still maintaining averages.



Green Onions

Supply highly inconsistent. Quality okay.



Mushrooms

Volume is lower than anticipated as summer production winds down. Forecasts are below expectations, and high demand is contributing to tightness. Supply will become very short as the retail holiday pull approaches. Quality is good.



Napa Cabbage

Supply and quality are good.



Parsley

Supply and quality are good.



Red Cabbage

Supplies are light, but quality is good.



Spinach

Supplies are currently limited but are improving as production moves to Yuma. Quality is also improving, though weak texture, discoloration, and wilting are still occasionally reported.



**Snow Peas &
Sugar Snaps**

Supplies are severely restricted. Adverse weather in Guatemala continues to limit production, with no significant relief expected until late November. Peruvian and domestic volumes are seasonally low/limited. Mexican production has just started but remains insufficient to meet demand. Elevated pricing persists as demand vastly outpaces available supply.



Onions

The market is expected to remain stable throughout Q4. All product will ship from Pacific Northwest storage. No significant market changes or volatility are anticipated, with supply, quality, and pricing generally favoring buyers.



Potatoes

Supply is fully supported by storage shipments for the remainder of the year with no major challenges. Sizing and availability across all categories are strong. Norkotahs will form the majority of the supply, with Burbanks starting to ship limited volume mid-October. The long-term market is expected to remain soft until late spring.