



OVERVIEW:

The overall market is highly volatile and extremely constrained, driven by widespread quality and yield loss from adverse weather, disease, and insect pressure, compounded by challenging transitions between growing regions. November is anticipated to be the tightest period of the year for pricing and supply. Extreme shortages are impacting key commodities, including Broccoli, Cauliflower, Lettuce, Romaine, and Romaine Hearts. Production from Salinas is struggling immensely due to rain, inconsistent temperatures, increased soil-borne diseases, and severe insect pressure (Diamondback Moth, INSV), leading to severe quality defects like pin rot, decay, larvae, and light weights. Growers face acreage loss and cannot meet committed averages. Brussels Sprouts, Celery, Cabbage, and all Leaf/Butter/Snap/Snow Peas markets are also highly escalated and supply is very light. The upcoming transitions to Yuma and Nogales are expected to be bumpy with likely supply gaps due to unusual weather patterns affecting those new areas. South Georgia offers good availability for Zucchini, Bell Pepper, Corn, and Cucumber, while West Coast Squash and Cucumber volume increases from Nogales.

Strawberry production, though strong in Central Mexico and Southern California, is not enough to offset seasonal declines, keeping the market tight. Melon supply is currently tight as the shift from Firebaugh to Yuma is impacted by rain and low yields. Banana and Pineapple availability is limited. Imported items from Guatemala (Peas, Carrots, French Beans) face quality issues and movement disruption due to poor weather and vessel delays. Avocado supply from Mexico is strong with stable volume across all sizes, fueled by high demand and promotional activity. However, heavy rains caused Lenticel spotting (skin blemishes that don't affect internal quality), and road blockades from Mexican corn strikes pose a threat to flow into the US. Navels are the main citrus variety now, trending larger; small sizes will be tight into 2026. Small Lemons (165ct+) are also very tight. Grapefruit availability will open up later this month as Texas/Desert Rio ramps up.

ALERT LIST:

ESCALATED

Asparagus, Artichokes, Arugula, Blackberries, Bok Choy, Cabbage (Green/Shredded), Celery/Celery Sleeved, Cilantro, Fennel (Anise), Hot Pepper (Jalapeno, Serrano, Caribe, and Red Fresno), Kale, Leeks, Napa, Spring Mix, Strawberries, White Asparagus

EXTREME

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

WATCH LIST:

Blueberries, Cabbage (Red), French Beans, Green Onions, Herbs, Lemons (Small), Limes (Large), Pineapple, Ginger, Spinach, Squash (West Coast), Melons (Cantaloupe and Honeydew).

BERRIES



Strawberries

Demand is still outpacing supply. While Oxnard, CA is recovering well with good quality fruit, other California areas are finishing up. Production in Central Mexico (CMEX) is increasing with good quality, but the combined CMEX and Southern CA volume is insufficient to cover seasonal declines from Salinas/Watsonville/Santa Maria. Expect the tightest supply and highest pricing of the year through November, with relief 3-5 weeks away.



Blackberries

Supplies have improved from increasing volumes out of CMEX and Baja. However, quality is inconsistent, showing issues like color reversion and isolated soft/overripe fruit due to recent heat, rain, and humidity.



Raspberries

Supplies have tightened due to recent rain, the end of the Watsonville season, and Oxnard decline. Quality is generally good but showing some soft/overripe fruit due to heat and humidity.



Blueberries

Supplies are steady, supported by strong production and good quality from CMEX, balanced by increasing arrivals from Peru.

CITRUS



Lemons

Remain a tight commodity because most current crops are yielding a larger size structure.



Limes

larger sizes are extremely limited, a trend forecasted to last through November. Pricing and quality will be mixed.



Specialties

Blood Oranges (small sizing) are nearly finished for the season. Grapefruit is available, though Fancy grade is light; Choice grade is readily available. Cara's, Minneolas, and Mandarins are all but done for the season.

WEST COAST LETTUCE



Iceberg & VA

Supply is extremely tight. Quality is fair but affected by INSV, lighter weights, and ribby texture. Rain in the forecast means production gaps are likely soon. VA: Supplies are tight, with fair quality. Harvesting and supply are severely affected by weather. Prorates are in effect, and yields continue to decrease.



**Romaine,
Hearts & VA**

Supplies are extremely tight, with demand pushing the market higher. Quality is fair, but growers are reporting bruising, mechanical damage, lightweights, fringe burns, light cupping, insect pressure, and disease (sclero/INSV). Usable heart material is minimal. Extreme prorates should be expected. VA: Supplies are severely limited, and prorates are extreme. Quality is acceptable, but production is negatively impacted by weather, leading to further supply stress and declining yields.



Green & Red Leaf

Supplies are extremely tight. Expect prorates. Quality is fair, showing mildew, fringe burn pressure, and lighter carton weights. Weather is the primary source of harvest difficulty and supply loss.

MELONS



Cantaloupe

New Yuma fruit is initially peaking on jumbo sizes; 12s are less than 2% of the total. Quality has been surprisingly good post-rain, but extra labor is required to clean the fruit, meaning some residual mud/dirt is inevitable. Fruit is firm with good brix levels (11–14%). Flexibility on sizing may be necessary at loading.



Honeydew

Domestic production is extremely limited, as reliance shifts to Mexican imports during the volatile fall weather. Volume crossing through Nogales is increasing, which is relieving market pressure. Scarring and mud/dirt are common characteristics. Sizing is almost exclusively 5s and 5Js; 6s are mostly absent. Flexibility on sizing is required at loading.



Watermelon

Domestic supply is available on both coasts, but prices are trending up due to less volume. Mexican supply (via Texas and Nogales) is constrained by challenges stemming from last month's rainfall.



TOMATOES – USA



Round & Roma

Round: Supply is ramping up from Ruskin and Palmetto in Florida, supported by stable volume from South Georgia. Quality is currently good. Roma: Supply is at its shortest point but is expected to increase over the next ten days as Florida volume rises. Overall quality is mixed but forecasted to improve.

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

Supply is AMPLE from current summer programs. Transition to South Georgia and Florida begins next week. Quality is outstanding.

California

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



TOMATOES – MX



Round	Volume is steady crossing through McAllen and Otay. Quality at the borders will be mixed this week but is anticipated to improve over the next seven to ten days.
Roma	Volume is improving through McAllen and Otay. Quality is good.
Grape	Excellent supply with weak demand is putting downward pressure on price. 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

Total volume remains strong: 74.2 million pounds were harvested in week 43, with 59.4 million pounds shipped to the U.S. Jalisco contributes about 10% of Mexican shipments. Both the Main Crop and the Off-Bloom Crop show consistent sizing, peaking on 48s and 60s, with dry matter levels holding well above the 23% minimum. Due to recent rains, shippers are seeing an increase in Lenticel—small, cosmetic brown spots on the skin that do not affect internal quality. The Main Crop now represents over half (53.7%) of the total volume. CA season is winding down; only 2.6 million pounds were harvested last week, with minimal volume expected through Nov.



Bananas

Supply is stable with very good quality, successfully meeting strong, rising demand from school business.



Pineapple

Expect the market to be very short for the next 14 months. This extreme tightness is driven by drought, low yields, and lost acreage in Central America. Although contract integrity holds, we must remain flexible on sizes to secure supply. Quality and flavor are otherwise good.



Table Grapes

Fall production continues in California with steady demand. Quality is mixed due to recent rain. Uncovered crops show issues like splits on reds, and greens are showing waterberry, ambering, and smaller sizing. Current varieties include Autumn Kings, Autumn Crisp (Green); Autumn Royals, Scarlets, Globes (Red); and Sweet Sapphire (Black). We anticipate moving into storage fruit by the second week of November.



Green Bell Pepper

Supply is steady from all active growing areas. Quality is currently good.



Color Bell Pepper

Supply is steady from all active growing areas. Quality is currently good.



Eggplant

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



Cucumbers

Slicer: Volume crossing through Otay, Nogales, and McAllen may be lighter due to recent weather delays in Baja and Sonora. Domestic supply from South Georgia was stable. Quality is good across all regions. English: Supply is light this week. Quality is good.



Green Beans

Supply and quality were mixed this week, despite light demand, as weather affected most growing regions.

French Beans

Guatemalan production is good with improving quality, but East Coast vessel delays are still an issue. Mexican supply is fair, supporting overall availability.



**Zucchini/
Yellow Squash**

Supply is light on both coasts. The West will tighten further as the California summer crop ends and transitions to Nogales. Production in the East (South Georgia) was slowed by cool, wet conditions but is expected to rebound this week. Overall quality is very good. New crop Hard Squash is ready for fall promotion.



Fresh Herbs

Basil production from Colombia and Mexico is strong, but heat has caused some minor quality problems. Imported Chervil remains limited due to weather issues in Ecuador. Overall herb supply is stable with good quality, though Sage remains tight due to weather-related challenges.



Artichokes

Supply is limited, although quality is good. Growers are enforcing averages, and substitutions on size may occur. Large sizes are extremely tight.



Asparagus

Mexican supplies improved this week with smaller sizing out of Hermosillo, but larger sizes remain limited. Peruvian volume and sizing continue to strengthen, supporting overall availability. Markets remain active due to the large-size deficit from Mexico.



Bok Choy

Quality is good, but light supplies are driving the escalated market price.



Borccoli/Crowns

Supplies are extremely limited with fair quality; yields are decreasing. Insect pressure has limited harvest. Pricing is at the extreme level, with reports of browning, pin rot, and insect larvae. Most growers are on prorate, with no ability to meet averages; expect severe prorates. Weather has compounded harvest and quality issues.



**Broccolini/Sweet
Baby Broccoli**

Supplies are extremely tight with fair quality. Pricing is at the extreme level. Growers are prorating, with some covering only 50% of 10-week averages. Weather has exacerbated harvest and quality problems.



Brussel Sprouts

Supplies are extremely limited. Growers face low yields and must now wait for new crops after pulling early to fill recent orders. Quality looks acceptable despite reports of insect pressure and internal browning. The market remains at the extreme trigger, leading to prorates.



Carrots

Supplies from Monterey and Kern Counties are steady with good sizing on jumbos. Quality is good and expected to improve as harvest moves to Lancaster and Cuyama through November. Mexican volumes are decreasing due to seasonality and increased competition from Canada.



Cauliflower

Supplies are extremely tight with fair quality. Growers are battling insect pressure and have begun prorating. The market remains at the extreme level due to weather impacts on harvesting and quality.



Celery

Quality is good, but supplies are extremely tight. Pricing is trending upward as fall demand rises sharply due to schools and football season. (Note: Organic Celery is at the extreme trigger).



Corn

West Coast volume is lighter; South Georgia volume is strong. All product is new crop, and quality is good.



Fennel

Lower yields have created a supply shortage. Pricing will remain escalated until volume improves. Some growers are using 8-week averages, but prorates have been seen.

FRUITS & VEGETABLES



Kale

Supplies are limited, with acceptable quality. Hail and other weather damage have impacted harvesting, moving the market to an escalated status.



Leeks

Quality and supplies are currently good.



Garlic

The transition to the new 2024–2025 California crop has begun, which should ease supply. Quality remains good. Initial availability will be limited to existing commitments while growers assess the new harvest volume.



Ginger

Supply and market conditions are steady.



Green Cabbage

Supplies are extremely tight due to poor yields. Growers are seeing difficulty with core size in Value-Added cabbage and are starting to limit averages. Weather has severely impacted harvest, quality, and ultimately reduced yields ahead of transition.



Green Onions

Supplies are currently very inconsistent. Quality is acceptable.



Mushrooms

Volume is lighter as summer production concludes and demand is higher than forecasted. Holiday retail pull will cause further supply tightness soon. Quality is good.



Napa Cabbage

Quality and volume are improving, although there are minor reports of insect pressure.



Parsley

Supply and quality are currently good.



Red Cabbage

Quality is good, but overall supplies are light.



Spinach

Supplies are limited from certain growers. Quality is fair but suffering from issues like weak texture, discoloration, wilting, wind damage, and insect damage. Heavy mechanical damage has also been noted due to the leaves being brittle.



**Snow Peas &
Sugar Snaps**

Supplies of Guatemalan snow peas and sugar snaps are extremely limited due to ongoing adverse weather, with no improvement expected until mid-November. Peruvian volume is seasonally light, and domestic supply is minimal, keeping prices very high. Relief is expected once Mexican production begins in the next two to three weeks.



Onions

The market is forecasted to be stable throughout Q4. All shipments will originate from Pacific Northwest storage following the conclusion of harvest. No significant market changes or volatility are anticipated; supply, quality, and pricing are expected to remain favorable to buyers.



Potatoes

Supply for the remainder of the year will be entirely covered by storage shipments, with strong sizing and availability across all categories. Norkotahs will form the bulk of the supply, with limited Burbanks beginning mid-October. The long-term outlook suggests a soft market until late spring.