



OVERVIEW:

The produce market is dealing with various supply issues. Green Beans and Roma Tomatoes are currently the tightest commodities, while Corn, Cucumber, and Green Bell Pepper have good supply.

In the West, Nogales crossings are improving; Tomatoes (starting with Romas) and Bell Peppers are expected to begin crossing in approximately four and three weeks, respectively. Florida tomato production is now hitting full stride in Ruskin and Immokalee. The Grape season is transitioning to offshore sources. Guatemalan Cantaloupe imports began with good quality, but sizing is heavier on the 9/12 count. Pineapple availability remains severely limited. Avocado supply is stable with good quality and low pricing, despite typical seasonal Lenticel.

Logistically, the East faces vessel delays and unpredictable arrivals due to Caribbean weather and port congestion. California berries suffered major quality issues and reduced shelf life from recent rain; normal production is targeted for mid-December. Most critically, Yuma rain has caused severe harvesting challenges and resulted in extremely tight supplies, delays, and shortages for baby leaf and leafy green items (parsley, cilantro, arugula) this week. Brussels Sprouts, Celery, and all Lettuce varieties (Romaine, etc.) are at an extreme market level due to low yields. Shortages are expected, and Brussels Sprout prorates are 50% through year-end. Artichokes, Broccoli, Cabbage, and various mixes are also escalated due to weather-related supply shortfalls.

The Citrus category is strong. Navel Oranges are peaking 88/113 with excellent quality. Lemons (D3) are peaking 140/115/165. Mandarins are ramping up, peaking 32/28, with Caras/Bloods anticipated in early December. California Garlic supplies are steady but will tighten later in the year.

ALERT LIST:

ESCALATED

Anise/Fennel, Artichokes, Asparagus, Blackberries, Bok Choy, Broccoli Florets/Crowns/Asian Cut, Brussels Sprouts VA, Green Beans, Green Onions, Hot Pepper (Anaheim, Caribe, Habanero, Jalapeno, Red Fresno, Serrano, Tomatillo), Leeks, Napa, Tomatoes (Romas and Snacking Tomatoes), White Asparagus

EXTREME

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

WATCH LIST:

Blueberries, Cabbage (Red), French Beans, Herbs, Pineapple, Ginger, Spinach, Melons (Cantaloupe and Honeydew), Mushrooms

BERRIES



Strawberries

California production is severely limited due to approx 6.5 inches of recent rain, forcing crews into field cleanup. Normal harvest schedules and volumes are expected to resume the week of December 1. Central Mexico volume is steadily increasing but remains insufficient to meet demand or cover California's decline. Florida production is very light and not expected to provide meaningful volume until mid-to-late December.



Blackberries

Availability is strong from Central Mexico (CMEX) and Baja. Quality is generally good, but monitoring is required due to isolated issues (soft fruit, red cell, color reversion) linked to recent heat, rain, and humidity.



Raspberries

Availability is strong from CMEX and Baja. Quality is good, but occasional soft or overripe product is present due to recent heat, rain, and humidity. Consistency is being closely monitored.



Blueberries

Availability is strong from Central Mexico. Quality and sizing are very good with consistent packs and strong field conditions.

CITRUS



Lemons

Good availability is noted across all sizes, especially on smaller fruit, with harvesting active in both D1 and D3 regions.



Limes

Supply is evenly distributed across all sizes but quality will remain mixed in the near term. Markets are slightly higher due to increased demand against lighter overall supply.



Specialties

Both are anticipated to begin mid-December. Note that the typical external "blush" color on Blood Oranges may not be visible initially but should develop by mid-January.

WEST COAST LETTUCE



Iceberg & VA

Supply is tight; weights are light. Harvesting delays from rain are causing production gaps. The market remains very volatile. VA: Supplies are adequate but facing prorates due to weather-impacted harvesting and quality, creating ongoing supply issues.



**Romaine,
Hearts & VA**

Supplies are tight. Quality reports note mechanical damage, bruising, fringe burns, and light cupping. Heart material is minimal in the hearts. Prorates are in effect. VA: Supplies are limited. Growers are prorating due to weather affecting harvestability and quality, ensuring continued supply strain.



Green & Red Leaf

Supplies are critically tight. Quality is fair, with mildew and fringe burn pressure reported alongside lighter carton weights.

MELONS



Cantaloupe

The sizing profile is shifting toward 9/12s on imports. Fruit is strong with solid netting and internal quality; brix levels range from 13-18%. Production and sizing are expected to improve as more growing areas are added.



Honeydew

Available domestically and imported from Mexico via Nogales, which has increased volume, relieving market pressure. Sizing is heavy on 5s and 6s. Scarring and mud/dirt are common seasonal characteristics. Guatemalan volume has been slow due to cool temperatures but should increase.



Watermelon

Available on both coasts, but prices are trending up due to decreasing supply. Mexican supply via Texas and Nogales is constrained by production issues from last month's



TOMATOES – USA



Round & Roma

Round: Supply is plentiful on new crop from Ruskin and Palmetto. Quality is outstanding. Demand is lackluster, leading to deals across all sizes. Roma: Light supply and high demand are causing upward pressure on prices. Volume is expected to increase next week. Overall quality is good.

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

Supply tightened this week due to cold weather. No improvement is expected until after the current high-demand period. Quality will be mixed.



TOMATOES – MX



Round	Volume is steady crossing through McAllen and Otay. Quality is good.
Roma	Supply is light this week via McAllen and Baja due to cooler weather. This, combined with high demand, is raising prices. Increased volume is not expected until late next week. Overall quality is good.
Grape	Lighter supply and high demand from the East are pushing prices up. Quality is good.
Cherry	Most volume is crossing from Baja; quality is very good. 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 is ample from Mexico, meeting strong US demand and keeping pricing low. The main crop is robust, now accounting for approx 70% of volume. Sizing peaks at 48s and 60s. Quality is stable; however, an increased presence of Lenticel (small, rain-related brown spots on the skin that do not affect internal quality) is noted.



Bananas

Supply is stable with strong demand and very good quality. Tariffs will be removed over the next two weeks as current inventoried stock is depleted and new product arrives. Updates on the tariff timeline will follow.



Pineapple

The market is slightly easing but remains tight with high demand keeping pricing stable. Contracts are secure, but flexibility on sizing is required to ensure supply chain stability. Quality and taste are good.



Table Grapes

California fall production is essentially finished due to recent weather, leaving the market reliant on storage fruit. Demand is strong, driving prices higher. Expect mixed quality, including shatter, waterberry, and reduced shelf life as the fruit ages. Green varieties are very limited; reds and blacks (e.g., Autumn varieties, Globes) are readily available.



Green Bell Pepper

Supply is stable and good quality is available from Coachella, Nogales, McAllen, and South Florida.



Color Bell Pepper

Supply of blocky varieties is steady from Coachella and via Mexico crossings. Shortages are expected in the East until Florida begins field-grown red varieties. Quality is currently good.



Eggplant

Domestic supply is steady from Fresno and South Georgia. Mexico crossings are ramping up this week. Quality is good across all regions.



Cucumbers

Slicer: Supply is steady via Otay, Nogales, and McAllen crossings with outstanding quality. Domestic supply is transitioning quickly to South Florida as Georgia's crop was heavily damaged by weather. English: Steady supply and good quality are available, crossing through Nogales and Canada.



Green Beans

High demand and a freeze in the Southeast last week have driven prices higher and limited overall volume. While the quality is generally good and supplies are steady via Nogales and McAllen, volume will be challenged in the near term, with some improvement expected as newer blocks become available.

French Beans

Overall availability is stable due to good production from Guatemala (with steadily improving quality) and fair supply from Mexico.



**Zucchini/
Yellow Squash**

Supply and markets will be mixed. Cold weather in the East may interrupt availability during the high-demand period as Georgia concludes its season. Steady crossings continue via Nogales and McAllen, and demand will transition to South Florida for the winter.



Fresh Herbs

Overall availability is steady with good quality, driven by strong Basil production from Colombia and Mexico. However, imported Chervil is limited due to weather in Ecuador, and Sage remains tight. Quality may vary based on field conditions.



Artichokes

Supplies are limited, and large sizes are extremely tight. Quality is good, but prorates and size substitutions are likely.



Asparagus

Supply is becoming more balanced as Mexican volume strengthens and Peruvian volume increases (with smaller/standard sizing). Market activity is softening, and pricing is less aggressive.



Bok Choy

Supplies are limited due to lower yields, which is driving the market and pricing. Quality is good.



Borccoli/Crowns

Supplies are very limited; rain has restricted yields in Yuma. Quality is "okay," but reports of Browning, Pin Rot, and Larvae persist. Prorates are occurring; Organic Broccoli is Extreme.



**Broccolini/Sweet
Baby Broccoli**

Supplies are extremely tight, with growers prorating (some only covering 50% of averages). Quality is fair, and pricing is at the extreme level. Expect issues until January 2026.



Brussel Sprouts

Supplies are extremely limited due to poor yields, insect pressure, and internal browning. Severe prorates are in effect (50% coverage). Expect supply and quality issues to persist until Mexican volume stabilizes in January 2026.



Carrots

Supplies are steady from Monterey/Kern Counties with good size on jumbos. MX volume is decreasing seasonally. Rain has affected harvesting, specifically limiting Cello and Jumbo availability until weather improves.



Cauliflower

Supplies are tight, and quality is fair. The market is at the extreme level, with weather continuing to impact harvesting and quality.



Celery

Supplies are extremely tight. Quality is good, but market prices are trending upward, driven by high demand and weather challenges.



Corn

Supply is lighter in the West but steady out of Florida and Georgia. All new crop with good quality.



Fennel

Lower field yields have created a shortage in supply. Pricing remains escalated, with prorates being seen.

FRUITS & VEGETABLES



Kale

Supplies are limited, and quality is "okay." Yields will continue to be challenging due to weather impacts on harvesting and quality.



Leeks

Quality and supplies are currently "okay."



Garlic

Quality remains good, but supply is snug. Steady purchasing is advised for assurance as the year progresses.



Ginger

Supplies and market pricing are stable.



Green Cabbage

Supplies are improving but still tight. Quality is good, though weather is impacting harvest and may cause supply issues; growers are holding to averages.



Green Onions

Supplies are highly inconsistent. Quality is acceptable, but weather continues to affect harvesting and quality, creating additional supply challenges.



Mushrooms

Supply is entering the typical holiday pattern of low volume and extremely high demand, expected to remain light through the beginning of the new year. Quality is good.



Napa Cabbage

Quality and supplies are reported as good.



Parsley

Both supply and quality are affected by recent rains. Harvesting was delayed, requiring growers to catch up, and prorates should be expected due to weather impacts.



Red Cabbage

Quality looks good, but supplies are light.



Spinach

Supplies are limited. Quality reports show some weak texture, discoloration, and wilting due to weather, which is causing supply challenges.



**Snow Peas &
Sugar Snaps**

Supply is severely limited. Guatemalan volume is very restricted due to weather (no improvement expected for 2-3 weeks), and Peruvian production is concluding seasonally. Demand far exceeds supply, keeping pricing elevated. Growers are covering only 50% of averages.



Onions

The market is expected to remain stable throughout Q4, shipping exclusively from Pacific Northwest storage. Supply, quality, and pricing favor buyers, with no significant market movement anticipated.



Potatoes

Supply is fully supported by storage shipments with no major challenges anticipated. Sizing and overall availability are expected to be strong. Norkotahs are the majority of supply, with Burbanks starting lightly. The long-term outlook suggests a soft market until late spring.