



OVERVIEW:

Tropical production from Florida and Mexico remains steady due to optimal conditions, ensuring consistent supply and excellent quality through Christmas. Avocado supply is stable with good retail demand despite lower pricing. Harvest volume will be limited on Friday for a holiday. Pineapple availability is limited; flexibility on sizing is requested. Last week, 62.9 million pounds were harvested in Mexico, with 56.9 million pounds shipped to the US. The grape season is seeing storage fruit supplies quickly deplete, with poor quality remaining. Imports are expected by the new year. Green grapes are extremely short, requiring substitution with red grapes for two to three weeks. Cantaloupe quality is good, but rain and cold weather have caused smaller fruit and lower yields.

Citrus supplies are generally available. Navel small sizes (138, 113, 88 count) are tightening; substitute with larger sizes where possible. Mandarins are readily available, though extra lead time is needed. Caras availability is increasing. Blood oranges are starting slowly, with expected pale coloring initially. Lemons are readily available. Red Rio Grapefruit is peaking at 40/48 count; confirm loading locations as some California shippers finish.

Strawberry production and quality are improving across all major regions, including Central Mexico, Baja, and Florida, with Florida availability strengthening within the week. California fields are transitioning crops, supporting a stable winter supply. In the desert regions, sunny skies prevail, but cool nights and previous weather events continue to restrict growth. Supplies of Broccoli, Baby Leaf/Tender Leaf, Cilantro, and Green Onions are very tight. Broccoli is constrained due to quality issues like pin rot and smaller sizing, forcing strict averages; it is added to a quality watchlist. Mann's Roma Crunch will be severely short for two weeks. Markets for Brussels Sprouts, Celery, Sugar Snap Peas, Snow Peas, Boston/Butter, Green Onions, Romaine, and Romaine Hearts remain at the extreme level, and shortages are likely. Brussels Sprouts are facing severe prorates, with one major shipper reducing supply by 50% for three weeks. Artichokes, Anise/Fennel, Leeks, and Napa are also escalated. Disease pressure, particularly pin rot, is a growing concern due to condensed planting schedules during heavy rain. California Garlic supplies are steady but will tighten; maintain average orders.

ALERT LIST:

ESCALATED

Asparagus, Artichokes, Fennel Anise, Green Leaf, Hot Pepper Poblano Tomatillo and Habanero, Leeks, Lettuce Iceberg, Lettuce VA Blends/Better Burger, Napa, Red Leaf, Strawberries, White Asparagus

EXTREME

Boston/Butter Lettuce, Brussels Sprouts, Brussels Sprouts VA, Celery/Celery Sleeved, Green Onions, Romaine/VA Blends, Romaine Hearts, Snow Peas & Sugar Snap Peas, Table Grapes

WATCH LIST:

Blueberries, Broccoli, Broccolini, Red Cabbage, Cauliflower, French Beans, Herbs, Limes, Pineapple, Ginger, Spinach, Melons (Cantaloupe, Honeydew), Mushrooms, Small Oranges

BERRIES



Strawberries

Supply has substantially increased across most areas. CA's summer crop is ending, but the new fall-planted crop in Oxnard is starting, ensuring winter supply stability. Quality is rapidly improving following recent rain, and better weather is forecasted. Minor color/size variation remains as plants recover, but quality will steadily improve with each harvest. (CMEX) volume is rising weekly with strong early quality. Baja is just starting and will build volume post-New Year. Florida production is light but expected to increase significantly within 5-7 days.



Blackberries

Good availability from Central Mexico and Baja. Quality is generally strong, though recent heat, rain, and humidity have caused minor softness or color reversion.



Raspberries

Good availability from Central Mexico and Baja. Quality is strong, although recent heat, rain, and humidity have resulted in some soft or overripe product.



Blueberries

Central Mexico production is robust, and availability is strong. Quality and sizing from Mexico are very good, with consistent packs.

CITRUS



Lemons

Good availability.



Limes

Supply is shifting heavily toward larger sizes. Quality may slightly decline as harvesting moves into older groves. Smaller fruit is tighter, driving up FOB pricing. Expect potential vulnerability in both size and price heading into the New Year.



Specialties

Blood oranges and Cara Cara varieties are expected to begin mid-December. Early Blood oranges may lack the typical exterior "blush," though the internal color will be present. The exterior "blush" is anticipated by mid-January.

WEST COAST LETTUCE



Iceberg & VA

Quality and supplies are good, but weights are light, keeping the market active. Quality and harvesting issues caused by weather are improving. Growers are monitoring for soil-borne diseases in rain-planted crops. VA: Quality and supplies are good.



**Romaine,
Hearts & VA**

Quality and supplies are adequate. Issues reported include bruising, mechanical damage, light weights, fringe burn, and light cupping. Hearts material is minimal. Weather impacted harvesting and quality. VA: Quality is adequate and supplies are good. Weather impacted harvesting and quality.



Green & Red Leaf

Quality is good, and supplies have improved. Mildew and fringe burn pressure is present. Carton weights are still light but improving. Weather impacted harvesting and quality.

MELONS



Cantaloupe

Sizing is shifting toward 9s and 12s on imports. Fruit is strong overall, featuring solid netting, good internal quality, and brix levels between 12-14%. Production is expected to improve over the next month.



Honeydew

Sizing is heavier on 6 and 8 count fruit from both Mexico and Guatemala. Overall volume remains extremely limited. Seasonal scarring and surface dirt are common.



Watermelon

Domestic watermelons can be found on both coasts, but decreasing supply is driving prices up. Mexican supply via Texas and Nogales is restricted due to production challenges from last month's rainfall.



TOMATOES – USA



Round & Roma

Round: New crop supply from Ruskin and Palmetto is plentiful, with outstanding quality. Deals are available across all sizes due to soft pre-holiday demand. Roma: Supply is slowly improving as growers open new fields; expect some price volatility this week. Overall quality out of Florida is good.

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

Medley: Supply will remain tight over the next week; increased volume is anticipated as growing conditions stay favorable. Grape/Cherry: Supply is steady, and quality is good for both Grape and Cherry tomatoes.



TOMATOES – MX



Round	Volume is steady crossing through McAllen and Otay. Quality is good.
Roma	Excellent supply this week as growers open new fields; expect some volatility if the national market strengthens. Overall quality is good.
Grape	Supply is steady, and quality is good for both Grape and Cherry tomatoes.
Cherry	Supply is steady, and quality is good.
Mixed Medley	Supply is stable this week, and quality is outstanding.

FRUITS & VEGETABLES



Avocados

US volume is stable, peaking in 48s and 60s. Dry matter is high (upper 20s). Expect increased visible lenticel (small brown skin spots) due to seasonal rain; this does not affect internal quality. The Main Crop constitutes 87.2% of the total harvest.



Bananas

Supply is stable with strong holiday demand and good quality. Tariffs on imports will be removed over the next two weeks as current inventory depletes. We will issue a timeline update soon.



Pineapple

The market is slightly easing but remains tight with steady pricing due to high demand. Contracts are being met, but we must stay flexible on sizing to secure supply. Quality and flavor are good.



Table Grapes

California fall production is complete, and storage inventory is rapidly declining due to strong holiday demand. Remaining California fruit has increasing quality issues (shatter, waterberry, potential mold) and limited shelf life. Green grapes are unavailable; substitute with reds until Chilean and Peruvian imports provide consistent supply. Significant import volume is not expected until the first or second week of January, causing near-term market volatility. Recommend reducing usage or substituting with alternatives like cut fruit for the next two weeks.



Green Bell Pepper

Steady supply is available from Coachella, Nogales, McAllen, and South Florida. Quality is good. Coachella production ends next week, transitioning all western supply to Nogales.



Color Bell Pepper

Coachella supply is quickly ending and will transition fully to Nogales next week. Expect shortages in the East until Florida begins shipping field-grown red peppers. Quality is good.



Eggplant

Domestic supply from Florida is steady, and Nogales crossings remain strong. Quality from both regions is very nice.



Cucumbers

Slicer: Supply crossing through Nogales and McAllen is steady with outstanding quality. Domestic supply is quickly transitioning to South Florida after Georgia's crop loss. Quality is good across all regions this week. English: Steady supply is available, crossing through Nogales and Canada. Quality is good.



Green Beans

Holiday demand has been light, pressuring prices downward. Supply is steady from Florida (breaking new fields) and crossings through McAllen and Nogales. Quality is good overall. Expect stable markets through the Christmas and New Year pull.

French Beans

Production is strong, and overall quality continues to improve. Mexico is providing fair supply, maintaining steady availability.



**Zucchini/
Yellow Squash**

Supply is stable and quality is good from Florida and crossings through McAllen and Nogales.



Fresh Herbs

Overall herb availability is steady with good quality, except for sage, which remains tight due to weather. Basil production from Colombia and Mexico is strong, but heat has caused minor quality issues. Imported chervil supplies remain limited due to weather impacting production in Ecuador. Quality across some items may vary based on field conditions.



Artichokes

Quality is good, but supplies are limited. Growers are adhering to averages, and size substitutions may occur. Large sizes are extremely tight.



Asparagus

Mexican production continues to strengthen. Peruvian volume is increasing in the north (Trujillo) and slowing in the south (Ica), shifting available product toward smaller, standard sizes. Markets are becoming less active as standard/small sizes from Mexico and Peru increase supply. The Peruvian season is 4–6 weeks from ending.



Bok Choy

Quality and supplies are good.



Broccoli/Crowns

Quality is adequate, but supplies are extremely limited for some growers, with reports of browning, pin rot, and larvae. Prorates are ongoing. Organic Broccoli is at the Extreme level. Cooler weather and previous weather events are challenging yields through the holidays.



**Broccolini/Sweet
Baby Broccoli**

Quality is good, and supplies have improved but remain limited with some growers. Weather impacts on harvesting and quality are subsiding.



Brussel Sprouts

Supplies are extremely limited due to poor yields. Insect pressure and internal browning are reported, and quality is just adequate. The market remains extreme. Severe prorates are expected, with growers covering 50% of averages. Expect supply/quality issues until Mexican product increases supply, likely in January 2026.



Carrots

Supplies of Bay, Cellos, and Jumbos are tight due to excessive November rain; availability will be limited. Rainbow Carrots are steady with great quality/supply. Mexican volumes are decreasing seasonally, shifting production toward Puebla. Cello and Jumbo Carrots are the most affected in all regions, limiting availability until weather improves.



Cauliflower

Quality and supplies are good, but cooler weather is affecting growth, which may challenge yields.



Celery

Quality is good, but supplies are extremely tight. Prices continue to trend upward due to holiday and football season demand. Weather impacts are causing additional supply issues, challenging yields through the holidays.



Corn

Supply is lighter in the west but steady out of Florida. All product is new crop, and quality is good.



Fennel

Lower field yields are causing a supply shortage. Pricing will stay escalated until supply improves. Some prorates are being seen, though some growers hold to 8-week averages.

FRUITS & VEGETABLES



Kale

Supplies are limited, and quality is adequate. Weather impacts are causing additional supply issues, challenging yields through the holidays.



Leeks

Quality and supplies are adequate.



Garlic

Quality remains good, though supply is snug. Maintain steady purchases to ensure product availability as the year progresses.



Ginger

Supplies and market are steady.



Green Cabbage

Supplies are still tight but improving. Quality is good. Some growers are holding to averages. Continued weather impacts could challenge yields through the holidays.



Green Onions

Supplies are very inconsistent, and quality is adequate. Weather impacts are causing additional supply issues, challenging yields through the holidays.



Mushrooms

Supply is expected to be light through the start of the year due to a typical holiday pattern of low volume and extremely high demand. Quality is good.



Napa Cabbage

Quality is good, but supplies are tight, and the market is increasing.



Parsley

Both supply and quality were negatively affected by recent rains, preventing harvest. Prorates should be expected until growers catch up. Weather impacts are causing additional supply issues, challenging yields through the holidays.



Red Cabbage

Quality looks good, but supplies are light.



Spinach

Supplies are still limited. Reports of weak texture, discoloration, and wilting persist. Weather impacts are causing additional supply issues, challenging yields through the holidays.



**Snow Peas &
Sugar Snaps**

Guatemalan supply is improving. Peruvian production is nearing its seasonal end. Domestic supply remains limited with elevated prices. Mexican production has started but volume is insufficient. Yields are challenging; most growers are covering only 50% of averages.



Onions

The market is expected to remain stable through Q4. All product will ship from Pacific Northwest storage now that harvest is complete. No significant market movement is anticipated, and the outlook remains steady. Supply, quality, and pricing should favor buyers, with plentiful availability expected.



Potatoes

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