



OVERVIEW:

Production from Florida and Mexico is steadily ramping up for the winter season, which is helping to stabilize most vegetable markets in advance of the crucial Christmas retail pull. However, volatility persists specifically in the markets for Roma Tomatoes and Green Beans, though general holiday shortages are not anticipated. The Grape market is in a sharp state of decline regarding availability, creating a crisis that is expected to last 14 to 21 days; supplies of storage fruit are essentially exhausted, and the arrival of import fruit is being held up due to a USDA issue with the first vessel. This will keep the market very short and costly.

Initial imports of Cantaloupes from Guatemala have begun, showing promising quality and Brix levels, although sizes are leaning toward 9/12 counts. Pineapple availability continues to be limited, and flexibility on sizing remains necessary. Avocado supply is stable, driven by strong demand and lower-than-average pricing, with common lenticel issues present due to recent rains. Logistics in the Eastern US are still hampered by unpredictable arrival schedules caused by continued weather disruptions in the Caribbean Sea and port congestion, meaning further vessel delays should be expected.

The supply of Strawberries is currently below demand but is projected to align within the next 10 to 14 days as increased production begins in Central Mexico, Florida, and Baja. California's production is successfully transitioning from the fall crop to the steady winter supply. The recent heavy rains have created an extremely tight market for many commodities, including wet vegetables and various leafy greens. Specifically, Brussels Sprouts and Celery supplies are critically low due to poor yields, with Brussels Sprouts prorate set at 50% through the end of the year. Quality is expected to remain challenging this week, but noticeable improvement is anticipated beginning next week as fields dry out.

In citrus, the Navel crop is peaking strongly in the 88/113 size range, boasting excellent color and high Brix levels. Lemons are readily available, while Mandarins are seeing a ramp-up in volume. California Garlic supply is currently steady but is forecast to tighten gradually as the season continues.

ALERT LIST:

ESCALATED

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

EXTREME

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

WATCH LIST:

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

BERRIES



Strawberries

Demand still exceeds supply, but better alignment is expected in 10–14 days as production increases in Central Mexico (CMEX), Florida, and Baja. California is transitioning to the steady fall-planted winter crop, and quality is recovering well following recent rain. CMEX is showing strong early-season quality, and Baja volume will build significantly after the New Year.



Blackberries

Production is ongoing in CMEX and Baja with good availability. Quality is generally strong, although recent heat and humidity are causing some softness and red cell reversion.



Raspberries

Production is ongoing in CMEX and Baja with good availability. Quality remains strong overall, with isolated instances of soft or overripe product due to recent heat and humidity.



Blueberries

Production in Central Mexico (CMEX) is active, providing strong overall availability. Quality and sizing from Mexico are currently very good, with consistent packs and field conditions.

CITRUS



Lemons

Good availability, especially in smaller fruits.



Limes

Supply is shifting heavily toward larger fruit, and quality may slightly decline as older groves are harvested. Smaller sizes are scarcer, driving up Free-On-Board (FOB) prices. Expect price and size instability moving into the New Year.



Specialties

Blood oranges and Cara Caras are projected to begin mid-December. Initial December blood oranges may lack the typical exterior "blush," though internal color will be present; the classic exterior blush should appear by mid-January.

WEST COAST LETTUCE



Iceberg & VA

Supplies are tight, and quality is fair; weights remain light. Rain has caused harvest delays and some production gaps. Growers are prorating, and the market is highly active. Challenging yields are expected through the holidays due to weather impacts. VA: Quality is fair, and supplies are okay, though some growers are prorating. Yields will be challenging through the holidays due to weather impacts on harvest and quality.



**Romaine,
Hearts & VA**

Supplies are tight, and quality is fair, with reports of bruising, light weights, and fringe burns. Heart material is minimal. Prorating is occurring. Yields will remain challenged through the holidays due to weather. VA: Quality is fair, and supplies are limited. Prorating is occurring. Yields will be challenging through the holidays due to adverse weather effects.



Green & Red Leaf

Supplies are extremely tight, and quality is fair. Mildew and fringe burn pressure are noted, along with lighter carton weights. Yields will remain challenged through the holidays due to weather impacts.

MELONS



Cantaloupe

The size profile is shifting toward 9/12 counts on imports. Fruit quality is strong with solid netting, good internal characteristics, and high Brix (12–14%). Production and sizing are expected to improve as more growing areas are added.



Honeydew

Sizing is heavier on 6ct and 8ct, but larger fruit should appear next week. Mexican product slowed due to a border protest. Seasonal scarring, mud, and dirt are currently common characteristics.



Watermelon

Domestic supply on both coasts is decreasing, causing upward price pressure. Mexican supply via Texas and Nogales is constrained due to production issues from last month's rainfall.



TOMATOES – USA



Round & Roma

Round: Supply is plentiful from the new crop out of Ruskin and Palmetto. Excellent quality is reported, and pricing deals are available across all sizes due to lackluster demand heading into the Thanksgiving Pull. Roma: Supply is slowly improving this week as growers transition to new fields, but some volatility is still expected. Overall quality from Florida is good.

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

Grape: Supply will remain tight over the next week. Volume is expected to increase as favorable growing conditions persist. Cherry & Medley: Supply is steady, and quality is good.



TOMATOES – MX



Round	Volume is steady, crossing through McAllen and Otay, with good quality.
Roma	Supply is slowly improving as growers transition to new fields. Some market volatility is still expected if national demand rises. Overall quality is good.
Grape	Supply will remain tight over the next week. Volume is anticipated to increase as favorable growing conditions continue.
Cherry	Supply is steady, and quality is good.
Mixed Medley	Anticipate tight supply for the coming week; volume should increase with continued favorable weather.
On the Vine	Stable volume available.

FRUITS & VEGETABLES



Avocados

Strong Mexican volume is satisfying US demand. The market is mostly stable, with minor decreases on large sizes, which still peak at 48s and 60s. The main crop represents over 70% of harvest volume. Increased surface-level Lenticel (small brown spots due to rain) is present, but internal quality is unaffected.



Bananas

Supply is stable with strong holiday demand and very good quality. Tariffs are set to be removed over the next two weeks as current inventory is depleted and new, tariff-free product arrives.



Pineapple

The market remains tight but has stabilized slightly. Demand is high, keeping pricing firm. Contracts hold, but flexibility on sizing is required to maintain supply stability. Quality and taste are good.



Table Grapes

California's fall harvest is ending, and post-Thanksgiving/pre-Christmas demand is depleting storage inventory rapidly. Remaining California fruit is expected to show significant quality issues (shatter, mold, poor shelf life). The planned arrival of first-volume imports from Peru/Chile is delayed due to a USDA hold, meaning market volatility will persist until early January. Recommendation: Reduce portion sizes or use cut fruit substitutions for the next two weeks.



Green Bell Pepper

Steady supply is available from Coachella, Nogales, McAllen, and South Florida, with good quality overall.



Color Bell Pepper

Supply is steady from Coachella and through Mexico for blocky varieties. Shortages are expected in the East until Florida begins harvesting field-grown reds. Quality is good.



Eggplant

Domestic supply is steady out of Florida and the desert. Mexico crossings also started to increase this week. Quality is good.



Cucumbers

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



Green Beans

Post-Thanksgiving volume has been light, creating downward pressure on prices this week. Supply is steady from Florida (breaking new fields) and via crossings through McAllen and Nogales. Quality is good overall. Stable markets are expected ahead of the Christmas and New Year's pull.



French Beans

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



**Zucchini/
Yellow Squash**

Supply is stable and quality is good out of Florida and through crossings at McAllen and Nogales.



Fresh Herbs

Basil production is strong from Colombia and Mexico, though heat has caused some minor quality issues. Imported Chervil remains limited due to weather impacts in Ecuador. Overall herb availability and quality are steady, with the exception of Sage, which remains tight due to weather challenges. Quality variation may continue depending on field conditions.



Artichokes

Quality is good, but supply is limited. Growers are adhering to averages, and substitutions on sizes may occur, with large sizes being extremely tight.



Asparagus

Mexican production is steadily improving. Peruvian volume is consistent in the north (Trujillo) but slowing in the south (Ica), which shifts sizing toward smaller counts. Markets are more active as seasonal supply declines begin.



Bok Choy

Quality is good, but limited supply is driving the market.



Borccoli/Crowns

Quality is fair, but supplies are very limited. Rain restricted yields at the new Yuma growing areas. Issues like Browning, Pin Rot, and Larvae are reported, and some growers are still prorating. Organic Broccoli remains at the EXTREME trigger.



**Broccolini/Sweet
Baby Broccoli**

Quality is fair, and supplies are extremely tight. Growers are prorating severely (some covering only 50% of averages). Challenging yields are expected through the holidays due to weather impacts.



Brussel Sprouts

Supplies are extremely limited due to poor yields, insect pressure, and internal browning. Quality is fair. Severe prorates (50% coverage) are expected until Mexican sprouts bring better volume around January 2026.\



Carrots

Supplies are tight and availability is limited on Bay Carrots, Cellos, and Jumbos due to excessive November rain. Rainbow Carrots remain steady with great quality. Mexican volumes are decreasing due to seasonality and competing local Canadian markets; rain has affected harvest for some growers, heavily impacting Cello and Jumbo Carrots.



Cauliflower

Quality is good, and supplies are improving; the market is no longer at the Extreme level, though holiday yields may remain challenging.



Celery

Quality is good, but supplies are extremely tight. Market prices are trending upward due to high holiday and football season demand. Yields will remain challenging through the holidays due to adverse weather impacts.



Corn

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



Fennel

Low field yields have created a supply shortage, keeping pricing escalated. Some prorating is occurring.

FRUITS & VEGETABLES



Kale

Supplies are limited, and quality is fair. Yields will be challenging through the holidays due to weather impacts.



Leeks

Quality and supplies are fair.



Garlic

Quality remains good, but supply is snug. Steady purchasing is advised.



Ginger

Supplies and market are steady.



Green Cabbage

Supplies are still tight but improving, with good quality. Some growers are holding to averages. Yields will remain challenging through the holidays due to continued weather effects.



Green Onions

Supplies are very inconsistent, and quality is fair. Yields will be challenging through the holidays due to weather impacts.



Mushrooms

The market is entering its typical holiday pattern of low volume and extremely high demand. Supply is expected to be light through the first of the year, but quality remains good.



Napa Cabbage

Quality is good, but supplies are tight, causing the market to increase.



Parsley

Recent rains have severely affected supply and quality. Growers are struggling to catch up, and shortages should be expected. Yields and supply issues will remain challenging through the holiday season due to weather impacts.



Red Cabbage

Quality looks good, but supplies are light.



Spinach

Supplies are limited, with some reports of weak texture, discoloration, and wilting. Yields will remain challenging through the holiday season due to adverse weather effects.



**Snow Peas &
Sugar Snaps**

Supply from Guatemala is limited due to recent weather, though availability should improve over the next 1–2 weeks. Peruvian production is ending seasonally. Pricing is highly elevated as demand significantly exceeds supply. New Mexican production volume is insufficient. Yields are challenging, and most growers are covering only 50% of averages.



Onions

The market is expected to remain stable through Q4, with all product shipping from Pacific Northwest storage now that harvest is complete. Modest price increases may occur, but no significant market movement is anticipated. The Northwest outlook favors buyers with plentiful supply, quality, and pricing, barring unforeseen disruptions.



Potatoes

Supply for the rest of the year will be fully supported by storage shipments with strong sizing and availability across all categories. Norkotahs will form the majority of the supply, with limited Burbanks starting mid-October. The long-term market is expected to remain soft until late spring, similar to last season.