



OVERVIEW:

Seasonal change is actively shifting crop locations and impacting market behavior. Summer crops are moving south, with Zucchini, Bell Pepper, Corn, and Cucumber supplies building out of South Georgia. To the west, Squash and Cucumber production is also increasing from Nogales. New crop Tomatoes are expected to begin harvesting in South Georgia this week, adding to the currently strong local availability which should hold until the first cold snap. Supply remains good across all varieties, supported by continued strong production from Mexico. Grapes are in excellent condition regarding both quality and production, ensuring the market remains steady and well-supplied through late October. The California Melon season, however, is quickly concluding; the deal out of Firebaugh is winding down, though quality is outstanding. Banana and Pineapple availability is still limited; flexibility is requested, particularly on pineapple sizing. Avocado supply from Mexico is robust and steady, ensuring ample volume. Pricing is currently favorable, creating excellent promotional opportunities, especially for medium and large sizes, with Mexico increasing volume to carry supply through October. Significant weather issues are creating substantial disruptions. Delays and persistent poor weather in Guatemala are tightly restricting the availability of key items, including Snow Peas, Sugar Snap Peas, Baby Peeled Carrots, and French Beans. In Salinas, the combination of hot, humid weather and recent rains is causing major crop issues. This is fueling soil-borne diseases and high insect pressure, with INSV and pests reported across fields of Lettuce, Romaine, Leafy Greens, Cauliflower, and Broccoli. The market is escalated for Cauliflower, Lettuce, Romaine, and Romaine Hearts, and Iceberg is at the extreme level. Supplies are light, showing poor quality (mildew, decay) and low yields, necessitating prorates. The tight supply and severe market escalation extends to Broccolini, Brussels Sprouts, Fennel/Anise, and Artichokes. Expect this volatility to continue until the shift to Yuma production next month. The Valencia citrus season is concluding; Navels start mid-to-late October. Navel sizing is projected to be larger this season, meaning smaller fruit will remain very tight well into 2026. Consult your supplier immediately regarding potential transition gaps. Grapefruit will be tighter in October, improving in late November/December. Small Lemons (165ct and up) remain tight, though better supply is anticipated soon. CA Mandarins start in November. The California Garlic crop is now in full swing, but partners are not currently accepting new volume commitments.

ALERT LIST:

ESCALATED	EXTREME
Asparagus, Artichokes, Blackberries, Bok Choy, Broccoli Florets/Crowns Cabbage, Green, Cauliflower, Celery, Cilantro, Hot Pepper, Lettuce VA Blends, Napa, Romaine/VA Blends, Romaine Hearts, Snow Peas & Sugar Snap Peas, White Asparagus	Brussels Sprouts, Fennel, Anise, Lettuce Iceberg

WATCH LIST:

Blueberries, Broccolini, Cabbage, Red, French Beans, Herbs, Lemons, Small Sizes, Limes (Large), Pineapple, Ginger, Green Onions, Green Leaf & Red Leaf, Spinach, Spring Mix, Strawberries

BERRIES



Strawberries

California regions are facing impact from recent tropical moisture and warm weather. Oxnard initially dealt with soft fruit and bruising, but quality is improving as damaged product is cleared. Santa Maria expects to recover from widespread rain and continue production for another month. However, Salinas/Watsonville may be done for the season after rain canceled harvests. Demand will exceed supply due to compromised quality in fields. Expect some softness or bruising in packs while growers manage the volatile period.



Blackberries

Production is currently active in Central Mexico (CMEX), Baja, and Watsonville. Oxnard has finished. CMEX and Baja are increasing weekly volume into the fall. While overall supplies have improved, recent heat, rain, and humidity are causing inconsistent quality, with reports of color reversion and some soft or overripe fruit.



Raspberries

Production is steady in Central Mexico (CMEX), Baja, Oxnard, and Watsonville. Quality is holding strong across all regions, with Watsonville performing exceptionally well, showing excellent color, sweetness, and aroma.



Blueberries

Supplies from Central Mexico (CMEX) are tight and expected to remain so through October, despite strong quality (firm fruit, good bloom, and excellent sizing). Shipments from Peru are still facing delays, though better arrivals are anticipated by mid-October. Demand continues to outpace supply, keeping the market active and prices elevated.

CITRUS



Lemons

Supply is extremely tight as summer ends. Most shippers are currently limiting volume to averages, especially on smaller fruit. Fancy grade percentage is down due to high wind events impacting quality. Expect minimal import relief unless you are part of an existing import program.



Limes

Supply is extremely tight on all sizes this week, with larger fruit being the shortest. Expect substitutions for larger sizes soon as old crop volume continues to drop. Supplies are forecast to be lighter through September, and pricing is expected to continue its upward trend for the coming weeks.



Specialties

Blood Oranges will finish the season shortly; sizing is small. Grapefruit is available, but Fancy grade supply is light; Choice grade is readily available. Cara's, Minneolas, and Mandarins are essentially done for the season.

WEST COAST LETTUCE



Iceberg & VA

Quality is okay, but supply is very tight. Growers are holding to averages. We are seeing INSV issues along with lighter weights and "ribby" lettuce. Expect production gaps due to rain in the forecast; the market remains very active. VA: Quality is okay, and supplies are tight. Growers are holding to averages.



**Romaine,
Hearts & VA**

Quality is okay, but supplies are tight. The market is trending higher due to increased demand. Reports show light weights, fringe burns, and light cupping. Growers are managing insect pressure, sclero/INSV, and are holding to averages. VA: Quality is okay, and supplies are limited. Growers are holding to averages.



Green & Red Leaf

Quality is good, but supplies are slightly light. Issues include mildew and fringe burn pressure, resulting in lighter carton weights.

MELONS



Cantaloupe

Production remains strong, with the majority of volume being larger sizes (peaking on 6s and 9s); 12s and 15s are very limited. Yields exceeded expectations, but the current sizing pattern may require flexibility on size. Quality is optimum, showing great size, color, and flavor, with high Brix levels (12-14%).



Honeydew

Production is not as strong as Cantaloupe, with a similar sizing pattern, peaking on 5s and 5Js (6ct is very limited). Flexibility on sizing will likely be required short-term. The long-term forecast is questionable due to substantial rains in Hermosillo, Mexico, which may impact that program's scheduled start in the second week of October.



Watermelon

Volume has started to firm up as local deals end. Availability will gradually decline as weather cools and Fall approaches. Quality remains strong.



TOMATOES – USA



Round & Roma

Supply is good on Rounds, but Romas will see lighter volume soon. The season will wind down in Alabama, North Carolina, Virginia, and Tennessee over the next two weeks, transitioning to Florida. Upper Midwest/Pennsylvania and Michigan production will finish this week. Quality is currently mixed but improving due to better weather; minor harvesting delays may occur due to expected weekend weather.

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

AMPLE supply is available from summer programs, with a transition to South Georgia and Florida starting within ten days. Quality is outstanding.

California

Production is in the Fall cycle, leading to lighter volume. Rain in the Central part of the state is expected to limit harvesting. Normal availability is expected through the end of the season, barring extreme weather. Quality is good.



TOMATOES – MX



Round	Volume is steady crossing through McAllen and Otay. Quality at all border crossings has been excellent. Markets are expected to remain stable, but weather in Southern California and Baja is being monitored for potential weekend production delays.
Roma	Increased availability and slow demand are driving the market down this week. Quality at all border crossings has been good. Markets are expected to remain stable, but weather in Southern California and Baja is being monitored for potential weekend production delays.
Grape	Excellent supply and weak demand are pressuring prices downward. 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

The avocado market is stable with strong quality. Last week, US volume reached 65.4 million pounds, a 26% jump from the week prior. Mexico harvested 63.7 million pounds, shipping 55.8 million pounds to the US, with Jalisco contributing 14%. Sizing for both the Off-Bloom and Main crops is peaking on 48s (Main Crop also peaks on 60s). The Main Crop now accounts for 22.5% of total volume. California harvested 4.3 million pounds last week with excellent quality, but volume is expected to finish in October. Peruvian fruit is almost done, with remaining stock diverted to the EU.



Bananas

Supply is stable despite strong, rapidly increasing school-related demand. Overall quality has been very good.



Pineapple

Pineapples are on the Watch List and will remain very short for at least 14 months. This is due to low production in Central America caused by drought, poor yields, and lost acreage. Contract integrity is being maintained, but flexibility regarding sizing is mandatory to ensure supply chain stability. Quality and flavor are good.



Table Grapes

Production is currently at its peak out of California. Quality and supply are stable for the Flames, Sugraones, and Ivory varieties.



Green Bell Pepper

Supply is steady from all growing regions. Quality is good.



Color Bell Pepper

Supply is steady from all growing regions. Quality is good.



Eggplant

Domestic supply is steady out of Fresno and local eastern regions. Quality is good. Mexico will begin crossing in Nogales in a few weeks.



Cucumbers

Slicer: Supply is stable crossing through Otay and McAllen, plus stable domestically out of North Carolina, Michigan, and Tennessee. Nogales is on the horizon. Quality is outstanding in the west and fair in the east. English: Supply is light this week. Quality is good.



Green Beans

Supply and quality were mixed this week, and demand was light as most growing regions dealt with weather-related pressure.



French Beans

Production remains steady, but minor quality issues are being reported due to heat, rainfall, and shipping delays in the East. Supply out of Mexico is fair, and markets are beginning to firm on both coasts.



**Zucchini/
Yellow Squash**

Supply is good out of the West (California continuing, Nogales ramping up). The East will see steady local volume likely through the first frost, with South Georgia starting the fall season strong. Sizing will skew larger initially as new fields are scratched, but should even out within ten days. Overall quality is very good. New crop



Fresh Herbs

Basil production remains strong out of Colombia and Mexico, though some heat-related quality issues persist. Tarragon supply continues to improve. Imported Chervil volumes from Ecuador have slowed due to weather.



Artichokes

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



Asparagus

Baja production remains low due to field transitions and weather. Peruvian volume is improving, but markets are active due to less Mexican product and new Peruvian volume. Peruvian arrivals will be delayed (starting end of this week) due to shipping line mechanical issues, meaning higher markets are expected due to more air-flown product.



Bok Choy

Quality is good, but supplies are still limited, driving the market higher.



Borccoli/Crowns

Quality is okay, but supplies are limited with decreasing yields. Insect pressure (diamond back moth) is restricting harvest. Mexico still has supply issues. Market remains escalated, with most growers holding to 8-10 week averages. Reports include Browning, Pin Rot, and Larvae. Organic Broccoli is at the extreme trigger.



**Broccolini/Sweet
Baby Broccoli**

Quality is fair, and supplies are extremely tight. Growers are prorating, with some only covering 50% of 10-week averages. Pricing is escalated for some growers.



Brussel Sprouts

Supplies are extremely limited. Some growers are struggling with yields or pulled early and are waiting for new crops. Quality looks good despite reported insect pressure and internal browning. The market remains at the extreme trigger, and growers are holding to averages.



Carrots

Supplies are steady out of Monterey and Kern County, with good jumbo sizing. Quality is good and expected to improve as growers move to Lancaster and Cuyama (harvesting through November). Mexican volume is decreasing seasonally and due to emerging Canadian markets, with strongest production in Guanajuato and Puebla.



Cauliflower

Quality and supplies are good, but the market is firming up and is forecasted to continue edging up this week and next. Organic Cauliflower is escalated.



Celery

Quality is good, but supplies are extremely tight. Market prices are trending upward due to the fall pull and increased demand from schools and football season. All Celery is escalated.



Corn

Supply is steady in the West, with the transition to South Georgia underway in the East. Markets eased this week, and the transition should be smooth. Quality remains good, but local crops will soon show some maturity issues like smaller ear and kernel size as fall production regions take over.



Fennel

Lower yields have created a supply shortage. Pricing will stay escalated until supplies improve. Some growers are holding to 8-week averages, and prorates have occurred.

FRUITS & VEGETABLES



Kale

Supplies have improved, and quality is good.



Leeks

No longer escalated. Quality and supplies look good.



Garlic

The 2024–2025 California season is ending, and the new crop has begun, suggesting potential supply improvement. Quality remains good, but availability is limited to current commitments until growers fully evaluate the new harvest.



Ginger

Supplies and market are steady.



Green Cabbage

Supplies have tightened, but quality looks good. Poor yields are reported in VA cabbage as growers try to limit the core size.



Green Onions

Supplies and quality look good, but there are initial reports of light supplies.



Mushrooms

Volume is lighter as summer production ends; forecasts are below expectations, and demand is higher. Supply is expected to become very short soon due to upcoming holiday retail pull. Quality is good.



Napa Cabbage

Quality and supplies are improving, but there is still some insect pressure.



Parsley

Supplies and quality look good.



Red Cabbage

Quality looks good, but supplies are light.



Spinach

Supplies are limited with some growers; quality is okay. Reports include weak texture, discoloration, wilting, moderate wind damage, and insect damage. There is also heavy mechanical damage due to brittle texture, accelerated by warm soil temperatures causing rapid growth.



**Snow Peas &
Sugar Snaps**

Supply from Guatemala remains limited due to adverse weather; quality is fair. Production in Peru is slowing seasonally. Domestic availability is also only fair. Prices are elevated due to these supply constraints.



Onions

The market is expected to remain stable throughout Q4. All product will ship exclusively from storage in the Pacific Northwest. While a modest increase may occur, no significant market movement is anticipated. The outlook is steady, favoring buyers with plentiful supply, quality, and pricing expected, barring unforeseen disruptions.



Potatoes

Supply for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. Burbanks will begin limited shipping mid-October, though Norkotahs will remain the majority of supply. The long-term outlook is similar to last season, where the market stayed soft until late spring before tighter supply led to higher pricing.