



Overview

Tomato production continues to fluctuate in South Carolina, Tennessee, and Virginia due to rain, while Mexico's production of Rounds and Romas remains steady. We are finally starting to see some relief in the Snacking Tomato market, but we still expect some challenges over the next week. In California, Tomato production remains steady. The Lime market will begin to ease as more volume crosses the border, with peak sizing concentrated on smaller fruit. Sizes 175 and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks. Hot Pepper production is expected to stabilize most varieties; however, Shishito, Habanero, and Red Fresno Peppers continue to be in the shortest supply. Table Grape supplies are steady this week, and quality is outstanding on the new crop out of California. We will also start to see the impacts of the Canadian Tariffs on mushrooms impact the industry over the coming weeks. In addition to these increases we will also see increases across the domestic supply chain which mostly impact growing and operating costs.

The market remains active but supplies and quality have improved. Celery remains the current exception. Quality issues are causing shortages, and the market is responding accordingly. Disease and insect pressure will continue to reduce harvestable acreage; however, supplies are currently at steady levels for the rest of the commodities. Growers anticipate these challenges will remain a significant factor impacting supplies throughout the season, with Lettuce, Broccoli, Cauliflower, and Celery availability expected to remain difficult throughout the summer months. As the temperature continues to increase in Salinas, these items could be further impacted. There is a current heatwave that will continue through the weekend. Artichokes and Anise/Fennel remain in limited supply and at the extreme trigger due to ongoing supply constraints.

The Avocado market remains stable as production from Mexico, California, and Peru continues to provide ample supply to meet current U.S. demand. Larger fruit comes at a premium cost, as the size profile favors 60ct and smaller. California and Peru production is slowly starting to taper off but we can expect a few more weeks of good volume from both. Cantaloupe supplies have returned to normal, while Honeydew volume has stabilized.

Berry markets remain generally well supplied, supported by good production across key growing regions and improving seasonal transitions. While some production areas are experiencing the typical seasonal decline, emerging harvests and peak production in other regions are maintaining balanced availability and strong overall quality. The primary exception is a continued regional transition that may create localized shifts in supply, but no widespread disruptions are anticipated. Overall, market conditions are expected to remain stable over the next several weeks, with favorable quality and adequate volumes supporting customer demand.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including Lemons and Oranges, with fruit generally trending larger. California Valencias are in full swing, with Navels winding down. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. Grapefruit supplies are currently stable. Please consider imported citrus this summer, as it will help relieve strained sizing, particularly for East Coast demand.

Freight: Limited truck availability and record-high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including ocean freight providers, implement fuel surcharges that will impact cost inputs.

Alert List

- Asparagus – **EXTREME**
- Artichokes 12ct – **EXTREME**
- Blackberries - **ESCALATED**
- Beans, Green – **ESCALATED**
- Celery – **ESCALATED**
- Celery Organic – **ESCALATED**
- Fennel, Anise – **EXTREME**
- Limes (175's and larger) – **ESCALATED**
- Pepper Green Bells – **ESCALATED**
- White Asparagus – **ESCALATED**
- Tomatoes, Snacking (Grape and Cherry) – **ESCALATED**

Watch List

1. Broccoli
2. Broccolini
3. Brussels Sprouts
4. Cabbage, Green
5. Cauliflower
6. Eggplant
7. Herbs
8. Ginger
9. Small Citrus Sizes across all Varieties
10. Spinach
11. Potatoes
12. Sweet Potatoes

Weather
SALINAS, CA

Thu 7/30	Fri 7/31	Sat 8/1	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6
71° 53°F	73° 55°F	73° 56°F	76° 55°F	76° 57°F	72° 57°F	72° 58°F	73° 57°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

BAKERSFIELD, CA

Thu 7/30	Fri 7/31	Sat 8/1	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6
103° 72°F	105° 72°F	106° 75°F	107° 76°F	107° 77°F	107° 77°F	107° 77°F	106° 77°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

OXNARD, CA

Thu 7/30	Fri 7/31	Sat 8/1	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6
76° 62°F	77° 64°F	79° 65°F	79° 64°F	77° 63°F	75° 64°F	76° 64°F	76° 65°F
							
AM Clouds/PM	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Sunny	Mostly Sunny	Mostly Sunny

JALISCO, NAYARIT

Thu 7/30	Fri 7/31	Sat 8/1	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6
84° 66°F	87° 67°F	85° 68°F	85° 67°F	83° 66°F	84° 67°F	85° 67°F	84° 67°F
							
PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	Thunderstorms	Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms

VIZCAINO, BAJA SUR

Thu 7/30	Fri 7/31	Sat 8/1	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6
93° 76°F	96° 76°F	93° 76°F	94° 74°F	90° 74°F	93° 73°F	95° 74°F	95° 75°F
							
PM Thunderstorms	Partly Cloudy	PM Thunderstorms	PM Thunderstorms	Thunderstorms	Thunderstorms	PM Thunderstorms	PM Thunderstorms

TORREON, COAHUILA

Thu 7/30	Fri 7/31	Sat 8/1	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6
102° 73°F	102° 72°F	101° 74°F	96° 71°F	93° 71°F	92° 71°F	92° 71°F	93° 71°F
							
Partly Cloudy	Mostly Sunny	Sunny	Mostly Sunny	Isolated Thunderstorms	PM Thunderstorms	Partly Cloudy	Partly Cloudy

EVENSVILLE, TN

Thu 7/30	Fri 7/31	Sat 8/1	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6
81° 61°F	85° 67°F	78° 68°F	79° 65°F	81° 66°F	83° 68°F	83° 68°F	84° 69°F
							
Mostly Sunny	Partly Cloudy	Thunderstorms	Showers	Showers	PM Showers	Showers	Showers

Fruits & Vegetables

Tariff Update: *President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.*

Avocados: Mexico sent 42.8 million pounds to the U.S. last week, average dry matter is 26.5%. California harvested 10.6 million pounds and has an average dry matter of 30%. Peru sent 6.5 million pounds with dry matter around 25%.

Bananas: Banana supply will be stable, but production is being curtailed due to virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program. Bunker rates will be released this week and next; expect them to be higher due to rising fuel costs.

Pineapples: In the coming weeks, Pineapple supplies will tighten up due to the natural flowering process. Contract volume should hold firm, but open market availability will drop, causing pricing to increase. Suppliers are expecting this to last for 4 to 6 weeks. This should not affect quality, which has been good. In the meantime, supply exceeds demand, keeping market pricing stable.

Table Grapes: We have completely transitioned to California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead and there may be supply issues on the back end of the season.

Berries

Strawberries: Strawberry supplies remain strong despite seasonal volume declines in Watsonville and Salinas. Fruit quality is generally good across both conventional and organic programs, with only minor bruising and soft skin reported. Santa Maria has begun harvesting light volumes of the organic fall crop, with conventional fall production expected to begin next week, helping support a smooth seasonal transition. Markets are expected to remain stable, with adequate supplies available even as weekly harvest volumes gradually decrease.

Blackberries: **ESCALATED** Blackberry supplies remain mixed as Watsonville continues peak production while Mexican conventional volumes stay light through August before improving in September. Quality in Watsonville remains strong, while Mexican fruit is rated fair to good due to weather-related impacts. Organic and conventional volumes from Watsonville are expected to increase in early August, improving overall market availability. Markets should gradually ease as California production offsets lighter Mexican supplies.

Raspberries: Raspberry supplies continue to improve as Watsonville enters peak production, with strong volumes expected through August. Mexican production also remains in peak harvest, providing additional supply support through the end of July. Fruit quality is excellent across both growing regions, with good firmness, color, and flavor reported. Markets are expected to remain steady as peak seasonal production continues.

Blueberries: Blueberry supplies are transitioning as Mexican production has concluded and California's Ukiah region approaches the end of its season. Pacific Northwest production continues to strengthen, with Washington, Oregon, and British Columbia harvesting mid-season varieties and weather conditions improving following brief heat and rain interruptions. Quality remains excellent, and strong Northwest volumes are expected to support the market through the coming weeks. Overall availability should remain favorable as Northwest production becomes the primary supply source.

Citrus

Limes: **ESCALATED** Supply continues to improve despite heavy rains in Mexico; however, sizing issues continue on fruit out of Mexico and other regions across Central America. The size distribution will continue to skew heavily toward 230s and 250s. Unfortunately, this is leaving larger sizes. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next few weeks.

Lemons: 140s/165s/200s are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve.

Navels: Finishing up, some suppliers are completely finished with Navels.

Valencias: California Valencias have begun and are projected to have strained supplies on small sizes.

Mandarins: Mandarins are finishing up and imports are coming in. Stay in contact with your supplier on other varieties or imports as alternative options.

Grapefruit: California grapefruit available!

West Coast Lettuce

Iceberg: Lettuce quality and supplies are good. We have seen some reports of internal burn.

Iceberg VA: Quality and supplies are good.

Romaine & Romaine Hearts: Supplies and quality are good. There have been some reports of tip and fringe burn. Organic Hearts remain at the extreme level.

Romaine VA: Quality and supplies are good. We are still seeing more core in the bags and some mildew.

Boston/Butter Lettuce: Quality and supplies look good.

Green Leaf, Better Burger and Red Leaf: Quality and supplies are good.

Green Bell Pepper: Supply is steady out of California; lighter supply out of the East due to ongoing rain and quality issues.

Color Bell Pepper: Good supply is available out of Filmore/Somis, Baja, and South Georgia this week. Quality is outstanding on open-field varieties. The Hothouse Pepper category is steady out of Canada and Mexico. Overall quality is good.

Jicama: Stable supply and good quality available.

Mini Sweet Pepper: Supply steady this week. Quality remains good.

Mixed Chili Pepper: Supplies are stable on most varieties. Decent numbers are crossing from Mexico; Coachella and South Georgia are ramping up as well. Markets remain very short on Habanero, Fresnos, and Shishito. For Fresnos, we recommend substituting with Red Jalapeño.

Tomatillo: Good supply and quality available this week.

Eggplant: WATCHLIST Central Valley is seeing lighter numbers due to weather-related pressure. We hope to see this improve over the coming weeks. California quality is fair. We are mostly seeing Choice available, with #1 Fruit being limited. Local programs in the East (Tennessee, North Carolina and Michigan) are limited this week.

Slicer Cucumbers: Supply crossing through Otay Mesa and McAllen will tighten up as the season starts to close and production transitions to Baja. In the East, we are seeing good supply out of South Georgia, Tennessee and Michigan. Quality is good from all shipping points.

English Cucumbers: Excellent supply out of Canada and still some crossings available in McAllen. Quality is good.

Pickles: Lighter supply is available out of South Georgia and Tennessee, with limited supply out of Mexico. Quality is good.

Green Beans: ESCALATED Lighter supply out of South Georgia and Kentucky in the East. In the West, Orange County and Baja supplies are limited. Quality remains mixed; good in the West and mixed in the East.

French Beans: French Beans: Supplies remain favorable as Guatemalan production continues at steady levels. Both organic and conventional product from Guatemala is readily available, while conventional production from Mexico also remains strong. Overall market conditions are well balanced, with stable production supporting good availability, consistent quality, and ample supply.

Zucchini/Yellow Squash: Steady supply on Green and Yellow Squash out of Michigan, Virginia and California. Markets were higher as demand came in a bit heavier than expected. Quality is good.

Herbs: WATCHLIST Herb supplies remain generally stable this week, with basil continuing to report good production, quality, and availability. Most herb varieties are seeing consistent market conditions, although oregano quality from Colombia remains affected by Rainfall, while chervil availability continues to be limited due to heat. Overall quality across the category remains favorable, with only isolated weather-related challenges affecting select items.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Steady	Steady	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	USA/MEX
Cilantro	Steady	Steady	Costa Rica
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA

Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA/MEX
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA/MEX
Savory	Steady	Steady	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Steady	Steady	USA/MEX
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

Cantaloupe: The market has seen a spike in volume recently that has led to softer pricing. Suppliers are reporting good sizing, strong external appearance and an excellent flavor profile. Production is expected to remain strong, moving forward. Fields are currently producing more 9s, while 12/15s are limited.

Honeydew: Honeydew production has stabilized, as volume has finally caught up with demand. Sizing still favors 5s, 6s are limited, and 8s are hard to find. Suppliers are asking for flexibility on sizing. Overall, the quality has been good.

Watermelon: The market has improved slightly as new growing areas out east have started harvesting. Production in the West has also increased but is still below levels from last year. Pricing remains elevated but should start to cool off, as more growing regions up north come on and the demand levels off.

Mixed Vegetables

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated. 12ct's remain at the extreme trigger.

Asparagus: EXTREME The market remains very active as demand continues to exceed available supplies. Northern Peru remains the primary production region and is expected to support the market through the first half of August before the seasonal transition to Southern Peru begins. Mexican production remains very limited and is expected to stay light through the remainder of the month, keeping the industry heavily dependent on Peruvian supplies. While the transition into Southern Peru is expected to be orderly, temporary supply gaps may occur until harvest volumes increase. Markets are expected to remain tight over the next 2 to 4 weeks as the industry works through the seasonal transition and production gradually improves.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: WATCHLIST Quality and supplies are good. A few reports of browning and pin rot continue. Organic Crowns remain at the extreme level. With insect pressure increasing, we will keep this item on the watchlist.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality is good, but supplies are limited.

Brussels Sprouts: WATCHLIST Quality and supplies have improved.

Carrots (JUMBOS, MEDIUMS and CELLOS): Quality and supplies are good.

Cauliflower: WATCHLIST Quality and supplies are good. With insect pressure increasing, we will keep this item on the watchlist.

Celery: ESCALATED Quality is fair and supplies are tightening up. Disease pressure remains a factor and is affecting harvestable acres. The market is trending up. Organic Celery is still at the extreme level.

Corn, Sweet: Light supply and firm markets will continue out of South Georgia, Virginia, Illinois and North Carolina in the East and California, Oregon and Washington out West. We expect to see demand stay strong and prices will be firm over the next week. Quality is good out of all regions.

Fennel: EXTREME Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

Kale: Quality and supplies look good.

Leeks: Quality and supplies look okay.

Garlic: Quality remains good, although supply is snug on this garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and markets are steady.

Green Cabbage: WATCHLIST Supplies and quality are good.

Green Onions: Supplies and quality are good.

Mushrooms: Supply is expected to be steady for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years, Canadian mushroom farmers received unfair subsidies, giving them a clear advantage over the domestic mushroom farming industry. The USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62–4.97%. These duties will be applied once the ruling is formally published. This will not only increase the price of imported mushrooms from Canada but will also put upward pressure on the price of domestically grown product as well. This is something domestic growers have been seeking some time to support increases in their operating costs over the past five years. We are also expecting to see domestic suppliers implement cost of living increases as the dust settles on the DOC rulings to compensate for increased growing costs, food safety, labor etc. Brought on by years of dumping practices out of Canada.

Napa Cabbage: Quality and supplies have improved.

Parsley (Italian & Curly): Quality and supplies are good.

Rapini: Quality is good, but supply continues to be light. The market is strong; therefore, supplies are expected to remain light.

Red Cabbage: Quality looks good, but supplies are light.

Spinach: WATCHLIST Supplies and quality look good but we are seeing rapid growth from the warmer weather which is resulting in larger leaf sizing and weaker texture. Insect activity has also increased. We are adding this item to the watchlist.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: Supply conditions continue to improve as production out of Guatemala increases, with sugar snap pea availability strengthening at a faster pace than snow peas. Domestic sugar snap supplies remain adequate, while snow pea availability is still somewhat more limited. Overall market conditions are trending in a positive direction, and the continued ramp-up in Guatemalan production is expected to improve availability and provide more consistent supply coverage over the next several weeks.

Onions:

Washington has started harvesting helping take some pressure off the issues off both New Mexico and California. Overall, the market is still struggling to keep up with demand, keeping open market pricing elevated. As we get more production from the Northwest, the market will begin to stabilize.

Potatoes: WATCHLIST

The market has strengthened as the size profile has shifted to finish out last year's crop. Suppliers are seeing a shift in the size profile toward smaller count sizes, 70–120ct, while 40–60ct have become tighter. Suppliers are watching inventories closely to make sure there is enough to last until new crop and to monitor quality issues. Shippers are requesting additional lead time and some flexibility on sizing when possible. Suppliers are covering programs and consistent customers.

Sweet Potatoes: WATCHLIST

The sweet potato market remains tight as we move into the final stretch of the 2025 storage crop. Limited supplies remain available nationwide, particularly on premium U.S. No. 1 grades and larger counts. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market. North Carolina and Mississippi growers are reporting lighter yields and tighter availability due to weather-related challenges from last season. Quality remains generally good; however, some lots are showing increased cosmetic defects and shrink tied to weather stress from last growing season. New crop harvest is expected to begin in limited volumes during August, with broader availability arriving in September. Suppliers are covering programs and consistent customers.

Tomatoes:

Tomato Suspension Agreement Update

Currently, duties are being imposed on Mexican tomatoes. We do expect to see some reporting from the ITC on the impacts of duties and anti-dumping violations sometime this year. NO major immediate changes are anticipated.

East Coast

- **Round and Roma Tomatoes:** Volume remains light this week out of Tennessee and North Carolina, mostly due to rain delays. Quality is mixed out of all regions. Small fruit is short, possibly requiring size substitutions.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Lighter volume this week on Grapes, Grape Medley, and Cherries due to transition and higher holiday demand. Markets are expected to remain active through the Fourth. Quality is fair at best.

Mexico

- **Round Tomatoes:** Supply will remain snug on larger-sized fruit this week. Quality is outstanding on what is crossing this week.
- **Roma Tomatoes:** Excellent supply and quality available out of Jalisco and Baja.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Grape Tomatoes and Cherries are very short this week due to lighter harvesting and higher demand. Medleys seem to be readily available. Quality on what is crossing the border has been good across all varieties.

California

- Supply is steady across the Golden State! Crops look amazing; we expect a great California season on vine ripens as well as mature greens.

Other Fruit:

Apples: As we move through the summer storage season, Washington Apple inventories continue to trend below both last year and historical averages across many key varieties, supporting the firm pricing environment that has developed throughout 2026. According to the most recent storage reporting, total conventional Apple inventories stood at 39.4 million cartons, down 12% from 44.9 million cartons last year and slightly below the three-year average of 40.4 million cartons. The market will remain elevated until new crop Apples start in August.

Pears: D'Anjou availability is tight and primarily limited to U.S. #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. Red D'Anjou Pears are moderately available in U.S. #1 35–55ct sizes and should remain in the market for another month, with new crop Starkrimson Pears expected to start mid-August. Both Bartlett and Bosc Pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Limited supply out of Mexico.

Asian Pears: Lighter volume, good supply on larger sizes.

Cherries: Good supply out of Washington State. NEW CROP.

Stone Fruit: Steady supply out of California and other local regions.

Papaya: Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

Mangoes: Steady supply out of Mexico, Peru and Puerto Rico. Varieties: Tommys and Ataulfo.

Kiwi Fruit: Supplies are fair out of Chile.

Quince: Limited supply available this week.