

Overview

Tomato production will slowly increase over the next two weeks out of South Carolina, Tennessee, and Virginia. Mexico's production appears to be lighter on Rounds, while Romas are flushing. Snacking Tomatoes are still very short this week and are expected to improve over the next 2–3 weeks. We are also seeing excellent supply from our California Tomato partners. The Lime market will begin to ease as more volume crosses the border, with peak sizing concentrated on smaller fruit. Sizes 175s and larger will remain short, making substitutions with smaller sizes necessary for the next several weeks. Hot Pepper production is expected to stabilize for most varieties; however, Shishito, Habanero, and Red Fresno Peppers continue to be the shortest. Table Grape supplies are steady this week, and quality is outstanding on the new crop out of California.

The market remains active. While overall quality and supplies have improved, disease pressure continues to reduce harvestable acreage. Growers anticipate this will remain a significant factor impacting supplies throughout the season, with Lettuce availability expected to remain challenging through the summer months. Broccoli and Cauliflower are beginning to experience quality and supply constraints. Both commodities are now on escalation, and market pricing continues to trend upward. Artichokes and Anise (Fennel) remain in limited supply and at the extreme trigger due to ongoing supply constraints.

Avocado market conditions remain stable as production from Mexico, California, and Peru continues to provide ample supply to meet current U.S. demand. Mexico is harvesting more of the Flor Loca crop, and we will soon see a shift in the size profile toward smaller fruit. California production remains steady and is expected to continue at current levels throughout July. Peru is also expected to maintain strong volume through the summer. Overall availability of Melons remains limited, with suppliers estimating another two weeks before volumes return to normal. A limited number of shippers are offering specialty Melons, such as Lemon Drops and Canary Melons, as alternative options for customers. Pineapple availability has improved and is expected to remain strong over the next two to three weeks, after which the market is expected to tighten.

Berry supplies remain generally stable as seasonal production transitions continue across North America. Strawberry and Raspberry markets continue to provide solid availability with good overall quality, while Blackberry supplies remain limited due to reduced Mexican production. Blueberry production is shifting into California and the Pacific Northwest, where increasing harvests are helping offset declining Mexican volumes. Overall quality remains favorable across the Berry category, with regional production changes continuing to influence short-term availability.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including Lemons, Navels, and Valencias, with fruit generally trending larger. Some suppliers are holding averages on Lemons. Please remain in close contact with your supplier on this matter and provide ample lead time. 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 begin considering imported Grapefruit this summer, as it will help relieve strained sizing, particularly for East Coast demand.

Freight: Limited trucks and record high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including sea freight companies, implementing fuel surcharges which will impact cost inputs.

Fuel Surcharges: We will continue to closely monitor fuel costs, which have been steadily increasing and impacting all aspects of operations, from field activities to freight. These rising costs affect not only the broader business but also the individuals who keep operations moving, including drivers and field crews. Fertilizer costs are also rising significantly and are expected to directly impact growers in the months ahead. The recent call for a ceasefire has temporarily paused discussions surrounding potential fuel surcharges; however, depending on the outcome of future developments, surcharges could still be implemented over the coming months.

Alert List

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| • Asparagus – EXTREME | • Honeydews – EXTREME |
| • Artichokes – EXTREME | • Limes (175's and larger) – ESCALATED |
| • Beans, Green – ESCALATED | • Pepper Green Bells – ESCALATED |
| • Broccoli Florets – ESCALATED | • Romaine Hearts – ESCALATED |
| • Broccoli Crowns/Asian Cut – ESCALATED | • Sugar Snap and Snow Peas – ESCALATED |
| • Cantaloupe – EXTREME | • White Asparagus – ESCALATED |
| • Cauliflower – ESCALATED | • Tomatoes, Snacking (Grape and Cherry) – ESCALATED |
| • Celery Organic – EXTREME | |
| • Fennel, Anise – EXTREME | |

Watch List

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|---------------------|--|
| 1. Blackberries | 6. Cauliflower |
| 2. Blueberries | 7. Herbs |
| 3. Broccoli | 8. Ginger |
| 4. Brussels Sprouts | 9. Small Citrus Sizes across all Varieties |
| 5. Cabbage, Green | 10. Sugar Snap and Snow Peas |

Weather

SALINAS, CA

Thu 7/9	Fri 7/10	Sat 7/11	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16
67° 55°F	68° 53°F	73° 57°F	72° 61°F	75° 60°F	75° 59°F	74° 57°F	71° 58°F
							
AM Drizzle	AM Clouds/PM	Partly Cloudy	AM Clouds/PM	Partly Cloudy	Partly Cloudy	Sunny	Mostly Sunny

BAKERSFIELD, CA

Thu 7/9	Fri 7/10	Sat 7/11	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16
101° 71°F	105° 74°F	105° 78°F	101° 79°F	102° 78°F	104° 77°F	103° 77°F	104° 80°F
							
Sunny	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny

OXNARD, CA

Thu 7/9	Fri 7/10	Sat 7/11	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16
74° 61°F	74° 62°F	73° 64°F	74° 64°F	75° 64°F	77° 66°F	83° 68°F	80° 67°F
							
Mostly Sunny	Partly Cloudy	Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny

JALISCO, NAYARIT

Thu 7/9	Fri 7/10	Sat 7/11	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16
79° 67°F	81° 66°F	86° 67°F	86° 68°F	81° 67°F	82° 67°F	81° 67°F	82° 67°F
							
Thunderstorms	PM Thunderstorms	Partly Cloudy	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms

VIZCAINO, BAJA SUR

Thu 7/9	Fri 7/10	Sat 7/11	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16
92° 74°F	95° 75°F	99° 75°F	100° 77°F	96° 76°F	93° 76°F	91° 75°F	92° 75°F
							
Scattered Thunderstorms	Partly Cloudy	Mostly Sunny	Mostly Sunny	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms

TORREON, COAHUILA

Thu 7/9	Fri 7/10	Sat 7/11	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16
93° 72°F	93° 74°F	93° 72°F	93° 72°F	95° 73°F	94° 72°F	90° 71°F	88° 71°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	PM Thunderstorms	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy

EVENSVILLE, TN

Thu 7/9	Fri 7/10	Sat 7/11	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16
88° 71°F	87° 72°F	82° 70°F	81° 69°F	83° 68°F	87° 68°F	89° 70°F	90° 71°F
							
AM Thundershowers	Cloudy	Thunderstorms	Thunderstorms	Thunderstorms	PM Showers	Partly Cloudy	Isolated Thunderstorms

LAKE PARK, GA

Thu 7/9	Fri 7/10	Sat 7/11	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16
93° 73°F	96° 73°F	95° 74°F	91° 73°F	86° 71°F	85° 71°F	90° 72°F	93° 73°F
							
Mostly Cloudy	Partly Cloudy	Partly Cloudy	PM Thunderstorms	Thunderstorms	Thunderstorms	Scattered Thunderstorms	Mostly Sunny

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 36.2 million pounds to the U.S. last week. Dry matter remains high at 36% for the main crop, while Flor Loca's dry matter has increased to 26%. California harvested 12.4 million pounds and has an average dry matter of 28%. Peru sent 12.8 million pounds with dry matter around 25%. The Mexican Flor Loca crop will be the main fruit we see in the U.S. soon, and we will see a shift in dry matter from 36% to the mid-to-upper 20% range, with the size profile favoring smaller fruit and a brighter green skin appearance.

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: The Pineapple market has improved and volume from Costa Rica has increased. Suppliers are expecting this extra volume to last for a few more weeks before the market starts to tighten again. Overall, the quality and taste are good.

Table Grapes: Mexico is finished, and we have transitioned to California. 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 production continues to be concentrated in Watsonville and Salinas as the Santa Maria season has transitioned out of the fresh market. Supplies remain strong, although volumes are expected to ease slightly over the coming week. Fruit quality continues to improve, with fewer defects reported, though occasional bruising, soft skin, and albino fruit remain present.

Blackberries: **WATCHLIST** Blackberry supplies remain limited as Mexican production continues to be impacted by seasonal pruning and recent rainfall. Quality remains fair to good, with weather affecting berry size and firmness in Mexico, while California continues to report excellent fruit quality with strong firmness, flavor, and appearance. Overall market availability is expected to remain tight until production begins recovering later in the season.

Raspberries: Raspberry supplies remain favorable with strong production from Mexico continuing through July. California quality remains excellent; however, weather has kept conventional volumes light, with meaningful production increases expected during Weeks 30 and 31. Organic supplies are expected to remain limited throughout July, while overall fruit quality continues to be excellent across both growing regions.

Blueberries: **WATCHLIST** Blueberry production continues its seasonal transition as Mexican supplies decline while California and the Pacific Northwest increase production. California quality remains excellent, though regional supplies are still somewhat limited as the season nears completion. Pacific Northwest harvests have entered peak production with excellent quality, supported by increasing volumes from Oregon and the start of packing in British Columbia, providing improved overall market coverage.

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, such as 175s and larger, extremely tight. We are also seeing moderate quality pressure, with imperfections present, such as oleocellosis. Markets are expected to remain firm through June and into the Fourth of July, with the World Cup taking place in the United States and expected to keep summer demand higher than normal. 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. There are also averages in place.

Navels: Manifest is peaking on 72s/88s. Supplies are extremely tight on 113s and 138s. This is also putting pressure on the 88s; be prepared to be offered 72s on many orders.

Valencias: California Valencias have begun and are projected to have issues on sizing.

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 is good; supplies remain limited but are improving. Weights will be light but are improving. Short shelf-life issues should still be expected.

Iceberg VA: Quality is good; supplies remain limited but are improving. We have seen reports of short shelf life, insect pressure, and mildew in bags.

Romaine & Romaine Hearts: ESCALATED Romaine and Romaine Hearts quality is good. Supplies remain limited but have improved. There are still some reports of bruising, fringe burn, light weights, and mildew on the outer leaves. The market is trending down. Hearts remain escalated.

Romaine VA: Quality is good and supplies are improving. 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 South Georgia and South Carolina in the East and Arvin in the West. Quality is good out of all regions.

Color Bell Pepper: Good supply is available out of Philmore/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 will be tight 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: South Georgia is done, and we will transition to the next regions. Coachella is done and has transitioned to the Central Valley. Quality is fair. We are mostly seeing Choice available, with #1 Fruit being limited. This should improve over the coming weeks as production increases and fields are cleaned up.

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. 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, Brentwood and Baja supplies are limited. Quality remains inconsistent.

French Beans: Availability remains very strong this week, supporting consistent market coverage. Demand has softened compared to previous weeks, while quality continues to report well across current harvests.

Zucchini/Yellow Squash: Steady supply on Green and Yellow Squash out of South Georgia and Fresno. Quality is good.

Herbs: WATCHLIST Basil supply and quality continue to improve. Supplies remain steady with fair quality across most other herb varieties, with the exception of Savory and Lemon Thyme.

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	Good	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	Limited	Steady	MEX
Thyme	Steady	Steady	USA/MEX
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

Cantaloupe EXTREME California's initial harvest produced good sizing and quality; however, supplies will remain limited for the next two weeks. There are still some suppliers with limited availability in AZ, but they will make their way to California in the next few weeks.

Honeydew EXTREME Honeydew harvest started slowly this week, with enough volume to mix and match some orders alongside Cantaloupes. Mexican production is still down, and the market remains limited with high pricing. California will have more volume in two weeks, and we can expect the market to calm down.

Watermelon: The market has tightened due to a lack of product out West, forcing the Southeast to handle all U.S. demand. The Fourth of July pull will put upward pressure on pricing, which will remain elevated until mid-July. Quality out of GA and FL has been good.

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.

Asparagus: EXTREME Peru and Mexico continue to experience the impacts of Super El Niño, with persistent weather challenges significantly reducing production across both growing regions. Overall supply is estimated to be 30–35% below normal, resulting in an extremely tight market where demand continues to exceed available supply. The most significant shortages remain on XL and Jumbo sizes, and spot availability is expected to remain very limited over the coming weeks.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is good, but supplies are tightening up. A few reports of browning and pin rot continue. Asian Cut Crowns remain escalated, and Organic Crowns are at the extreme level.

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

Brussels Sprouts: WATCHLIST Quality is fair, and supplies are limited on Jumbos. Growers are still combating insect pressure and internal browning. The weather in Mexico is warming up, which is also causing quality issues and reduced yields.

Carrots (JUMBOS, MEDIUMS and CELLOS): Quality is good and supplies have improved. The market has finally recovered.

Cauliflower: ESCALATED Quality is good, but supplies are tightening up. Growers are starting to hold to averages. The market is trending up.

Celery: Quality and supplies have improved. Disease pressure is still a factor, especially on organic celery but overall quality and supplies look good. Organic Celery is still at the extreme level.

Corn, Sweet: Light supply and firm markets will continue out of South Georgia in the East and Brentwood out West. We expect to see higher demand and higher market pricing through mid-July. 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 for some time to support increases in their operating costs over the past five years.

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: Supplies and quality look good.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: ESCALATED Snow Pea and Sugar Snap Pea market conditions remain largely unchanged this week. Guatemalan availability continues to be limited, while Peruvian volumes also remain light and are expected to stay at similar levels over the coming weeks. Demand remains steady across both origins, and overall quality continues to be good, with no significant changes in market conditions.

Onions:

New Mexico volume has dropped off as suppliers deal with lower yields and seeder issues. Suppliers in California are also dealing with low volume as they work through transition challenges. Issues in both New Mexico and California are leaving the market limited on all sizes and colors, while pricing has jumped quickly. Production is expected to pick up in a few weeks.

Potatoes:

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 for quality issues. Shippers are requesting additional lead time and some flexibility on sizing when possible.

Sweet Potatoes: The Sweet Potato market has tightened as the industry moves into the final stretch of the 2025 storage crop. Limited supplies remain available nationwide, but inventories are gradually declining, 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 heading into summer. 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.

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 is steady this week out of Tennessee and North Carolina. Quality is mixed out of all regions.
- **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; markets were mixed but seem to be easing back some as demand winds down for the holiday pull at retail. 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 continues to improve as we see steady availability 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 Israel.

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.

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 California as well as offshore arrivals on the East Coast.

Quince: Limited supply available this week.