

## Weekly Market Review January 22, 2026

### Overview

Production will be lighter out of all growing regions over the next several days due to cold weather and rain not just impacting Florida but Mexico as well. In Florida, we saw temps below freezing for multiple hours in some districts over the past week, and our growers will be assessing damages over the next several days, which will further tighten supply and create market volatility. As of today, we are seeing moderate demand with a lot of mixed quality across all commodities. Short-term we will see tighter markets on some Hot Peppers, Bell Peppers, and Squash. Tomatoes are also getting tighter, Romas and snacking tomatoes in particular, while rounds seem to be holding steady. In addition to the weather, we have seen that in the growing regions we are now watching a winter storm that will reach well across a majority of the country from Texas into the Midwest and Deep South; this storm is expected to impact the supply chain for the next several days as several feet of snow combined with ice are forecasted across these regions. Table Grape supply is steady as offshore volume continues to be strong, with good supply on reds, while green varieties are behind and are the shortest. Quality has been outstanding! The Lime market is active and large-sized fruit is tighter this week as we drill into the newer regions, which are peaking on 200s and smaller currently. We expect volatility through Q1 as predicted. Banana supplies are expected to tighten going into the new year, with challenges anticipated on the spot market as growers navigate increased global demand combined with virus-related and economic pressures in tropical growing regions. We are seeing better arrivals on Cantaloupes and Honeydews from Guatemala this week. Quality has been holding up nicely with good Brix levels on both. Pineapple availability has improved slightly but remains limited, and shippers are asking that we continue to be flexible on Pineapple sizes. Total Avocado volume for Week 3 increased to 85.7 million pounds, the largest single week in the U.S. Demand will remain strong from now until the Super Bowl, and daily harvest will stay elevated to keep up with this demand. The current size profile continues to favor medium and large fruit, while small sizes are becoming more limited as the season progresses. Lenticel is still present but is typical for this time of year due to rain. Colombia season is going strong, with limited volume currently landing in the U.S. The Oxnard and Santa Maria summer-planted fall crop is quickly winding down. Still, fall-planted spring crops are coming into production at the right time to help maintain steady winter supplies, with good quality and gradually improving volumes expected under warmer, drier conditions. Baja Mexico production is ramping up for both Conventional and Organic, while Central Mexico volume has started to trend lower after reaching peak levels, though overall quality remains strong. Florida production is down roughly 50% due to cooler temperatures and frost protection activity, and supplies are expected to remain lighter for the next couple of weeks before rebounding with warmer weather. Bush Berry production remains active in Central Mexico and Baja, with Raspberries tightening post-peak, Blackberries showing good availability with minor softness and color reversion, and Blueberries continuing to tighten as demand exceeds supply, though Mexican quality and sizing outperform offshore options. The weather in Yuma is cooling off and will be a welcome sign to help slow growth on some items. Unfortunately, the previous weather has already done some damage and caused mildew issues on Lettuce (Romaine, Iceberg, and Green Leaf) and all Tender Leaf items. As a result of the mildew limiting harvestable acres, Spinach will remain escalated, and supplies will be limited. Arugula and Spring Mix will also be affected. You can expect to see quality issues, limited supplies, possibly prorates, and shortened shelf life on all of those Lettuce and Tender Leaf items. These issues are expected to persist throughout January. The Lettuce market has started to rise and will continue to rise over the next few weeks. Supplies will be tightening up, and case weights will be reduced. We can expect a volatile Lettuce market as we head into February. Supplies on Brussels Sprouts, Carrots, Celery, and Green Onions will also continue to be extremely limited across the industry. Those 4 items are likely to see prorates. Green Onions will continue to be limited, and we will likely not see full relief until we get into February. The Celery fields that were significantly affected by the storms are still limiting the supplies that are available. Many acres were lost. Whole Celery will be held to strict averages, but you will see prorates on the VA Celery packs. The prorates will not be severe, but 10–15% allocations should be expected on the VA items. Celery supplies will remain limited until mid-February. Carrots are also being held to strict averages, and you can expect to see prorates on Cello's and Jumbos. Harvesting has been greatly affected by the rain, and with the fog settling in, they are not getting the sun they need to dry up the fields. These issues are expected to last for the next 2–3 weeks. Brussels Sprouts are once again struggling with supplies. Growers are holding to strict averages, when possible, but we have seen prorates. While things are slowly improving, Sprouts will likely not have full relief for another 3 weeks. Italian Parsley and Cilantro remain very tight, with growers holding to strict averages where possible, though some prorates are expected. Broccoli and Cauliflower are now escalated on all sizes. Growers continue to experience pin rot, water spotting, and smaller sizing, which is resulting in limited supplies. Artichokes, Anise/Fennel, Leeks, and Napa Cabbage also remain escalated, with ongoing quality and supply challenges. Artichokes still only have small sizes (12ct) available. Whole Carrots, Cilantro, Celery, Green Onions, Parsley, and Brussels Sprouts remain the most challenging commodities at this time, but Lettuce, Broccoli, and Cauliflower are items that are escalating and will likely have supply and quality issues over the next few weeks. We are keeping a close eye on the issues with the mildew and weather and will continue to send out updates as we receive information. We are likely to see some gaps in supplies as the cooler weather starts to slow things down. Ongoing fog and recent rain events across California are continuing to create uneven harvest conditions, and some suppliers are seeing different availability and size profiles depending on district and house. In the Central Valley, persistent wet fog has slowed morning picks and limited harvest windows. As a result, day-to-day availability can fluctuate, and food service customers are encouraged to stay flexible and call ahead on all varieties. Across Navels and Cara Caras, size structure remains heavily skewed to large fruit. Many suppliers report packing very limited 113s and smaller, while others are seeing tightening supplies on 88s as well, often resulting in substitutions into 72s. Overall, the best coverage continues to be on 72s and larger. Lemon supplies are generally stable, though some suppliers are seeing stronger coverage than others. In both the Central Valley and Oxnard, many houses report availability across all sizes, with fruit leaning toward Fancy grade and peaking on 140s and larger. Other suppliers note that 165s and 200s are a bit snug but still workable. In certain districts, small fruit is firming up, making bagged options a practical solution for back-of-house usage. Domestic Meyer Lemons remain available out of D1 and Mecca, CA. Mandarins remain a mixed situation. Some suppliers are extremely limited this week, while others are beginning to see improvement as fields dry out. Size profiles are trending larger overall. Minneolas are just getting started in California, with early picks slowed by fog; most suppliers anticipate more consistent foodservice volume toward the end of January. Cara Cara Navels are tracking similarly to conventional Navels. While some suppliers report little to no availability on smaller sizes, others are peaking on 88-count fruit, with large sizes dominating the mix. Blood Oranges are beginning to come on, though availability remains supplier-specific and customers should call ahead. Rio Red Ruby Grapefruit is available. Suppliers are seeing strong

volume on Pummelos with excellent eating quality and bulk bins available. In Texas, citrus supplies are more consistent. Texas Navels are finishing up, with the last of the earlies shipping this week before transitioning into Texas Valencia Oranges, where manifests are peaking on 72s and 88s. Texas Rio Red Grapefruit is actively shipping, with most suppliers peaking on 40s and 48s and strong availability on larger sizes well suited for foodservice programs. Flexibility on size and pack style will remain key for buyers in the coming weeks.

#### Alert List









- Asparagus – ESCALATED
- Artichokes – ESCALATED
- Bok Choy – ESCALATED
- Boston/Butter Lettuce – EXTREME
- Blueberries – EXTREME
- Broccoli – ESCALATED
- Broccoli Crowns Asian Cut – ESCALATED
- Brussels Sprouts – EXTREME
- Brussels Sprouts VA – EXTREME
- Cauliflower – ESCALATED
- Celery/Celery Sleeved – EXTREME
- Cilantro – ESCALATED
- Green Beans – ESCALATED
- Fennel, Anise – ESCALATED
- Hot Pepper: Red Fresno, Habanero and Shishito – ESCALATED
- Leeks – ESCALATED
- Lettuce – ESCALATED
- Limes – ESCALATED
- Napa – ESCALATED
- Green Onions – EXTREME
- Parsley Italian – ESCALATED
- Spinach – EXTREME
- Snow Peas & Sugar Snap Peas – ESCALATED
- Tomatoes (Roma and Snacking Tomatoes) – ESCALATED
- White Asparagus – ESCALATED

#### Watch List









1. Bananas
2. Broccolini
3. Cabbage, Red
4. French Beans
5. Herbs
6. Small Lemons
7. Pineapple
8. Ginger
9. Melons – Cantaloupe and Honeydew
10. Raspberries
11. Small Oranges (138/113/88)
12. Strawberries
13. Florida Warm Veg – Corn, Cucumber, Eggplant, Bell pepper, Soft Squash

#### Weather









##### YUMA, AZ

Thu 1/22	Fri 1/23	Sat 1/24	Sun 1/25	Mon 1/26	Tue 1/27	Wed 1/28	Thu 1/29
75°   52°F	72°   54°F	71°   48°F	70°   44°F	71°   46°F	74°   47°F	74°   52°F	77°   52°F
							
Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny









##### OXNARD, CA

Thu 1/22	Fri 1/23	Sat 1/24	Sun 1/25	Mon 1/26	Tue 1/27	Wed 1/28	Thu 1/29
67°   50°F	63°   51°F	63°   49°F	65°   47°F	66°   48°F	67°   50°F	66°   50°F	67°   51°F
							
AM Light Rain	Partly Cloudy	AM Fog/PM	AM Clouds/PM	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy









##### CULIACAN, SINALOA

Thu 1/22	Fri 1/23	Sat 1/24	Sun 1/25	Mon 1/26	Tue 1/27	Wed 1/28	Thu 1/29
89°   62°F	88°   63°F	68°   55°F	81°   53°F	84°   53°F	83°   55°F	85°   55°F	84°   57°F
							
Partly Cloudy	Mostly Cloudy	Rain	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy









##### HERMOSILLO, SONORA

Thu 1/22	Fri 1/23	Sat 1/24	Sun 1/25	Mon 1/26	Tue 1/27	Wed 1/28	Thu 1/29
84°   63°F	78°   59°F	66°   54°F	76°   49°F	80°   49°F	81°   50°F	83°   53°F	80°   51°F
							
Cloudy	Mostly Cloudy	Showers	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

##### JALISCO, NAYARIT

Thu 1/22	Fri 1/23	Sat 1/24	Sun 1/25	Mon 1/26	Tue 1/27	Wed 1/28	Thu 1/29
81°   55°F	81°   57°F	72°   54°F	74°   51°F	79°   52°F	79°   53°F	81°   54°F	80°   54°F
							
Partly Cloudy	Partly Cloudy	PM Showers	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny

## IMMOKALEE, FL

Thu 1/22	Fri 1/23	Sat 1/24	Sun 1/25	Mon 1/26	Tue 1/27	Wed 1/28	Thu 1/29
81°   61°F	85°   63°F	86°   64°F	89°   69°F	77°   40°F	68°   45°F	73°   44°F	71°   40°F
							
Partly Cloudy	Partly Cloudy	PM Showers	Sunny	AM Showers	Mostly Sunny	Mostly Sunny	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. However, tariffs will be removed over the next two weeks, based on their arrival time in the United States on items such as Bananas, Coffee and Pineapple to name a few key items. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.

**Avocados:** Mexico had a 99.7-million-pound for week 3, with 83.6 million pounds shipped to the U.S. Sizing continues to peak toward 48s and 60s count, while dry matter has climbed to 30%. The main crop now accounts for 90% of the total harvest volume. Demand is expected to remain strong in January, and harvest volumes have increased to better align with industry needs.

**Bananas:** WATCHLIST Banana supply will begin to tighten over the coming weeks as global demand increases and production in the tropics steadily declines. A combination of virus pressure, low yields, and increasing production costs has placed significant strain on this staple commodity. Overall, banana quality remains very good, and supply is adequate. The key to navigating the coming year will be consistency in supply, consistent ordering patterns, and staying proactive to address any potential issues that could impact the program.

**Pineapples:** WATCHLIST The pineapple market has begun to settle slightly but remains tight. Demand continues to be high, keeping pricing stable. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, quality and taste are good.

**Table Grapes:** Quality is outstanding. Markets are still firm, however, they are sliding as more fruit becomes available. Green fruit does seem to be the tightest but is expected to improve over the next 10 days. Green varieties available: Sweet Globes. Red varieties: Red Globes, and Sweet Flavor. There are also generic varieties on all three colors available this week.

### Berries

**Strawberries:** WATCHLIST The Oxnard and Santa Maria summer-planted fall crop is rapidly declining as seasonal production winds down. However, fall-planted spring crops in both regions are coming into production at the right time to support steady supplies through the winter months. Quality remains good, and volumes are expected to increase gradually as warmer, drier weather persists. Out of Baja, MX, conventional and organic production is ramping up, with volumes forecasted to increase week over week as warmer, drier conditions are expected in the immediate forecast. Central Mexico production remains steady. Still, it has begun to trend lower after reaching peak volumes over the past month. Overall quality remains good. Production in Florida is down approximately 50% compared to recent weeks due to cooler temperatures and reduced harvest estimates. Growers have been running overhead sprinklers for frost protection several nights over the past week, most recently Monday morning. A warming trend is expected during the back half of this week before temperatures shift back to cooler conditions next week. Production is expected to remain lower for the next couple of weeks, but should rebound once temperatures return to more normal, warmer conditions.

**Blackberries:** Production continues in Central Mexico and Baja with good overall availability. Quality remains good, though some softness and occasional red cell or color reversion are being observed as a result of recent heat, rain, and humidity.

**Raspberries:** WATCHLIST Production remains active in Central Mexico and Baja, though supplies have tightened as crops move past seasonal peak volumes, resulting in reduced availability. Overall quality remains good; however, some instances of soft or overripe fruit are being reported due to recent heat, rainfall, and elevated humidity in the growing regions.

**Blueberries:** EXTREME Production remains active in CMEX(Central Mexico), though supplies are tightening as volume trends down from seasonal peak levels. Mexican quality and sizing continue to perform well, and CMEX blueberry quality is reported to be significantly stronger than offshore blueberry offerings currently in the market.

### Citrus

**Limes:** ESCALATED Supply will be short this week out of Mexico, Columbia and Peru. Size profile and very low volume due to rainfall seem to be the common impacts to the growing regions. As we get deeper into the new crop, we expect to see very light volume on 175's and larger. All regions are Peeking on 200's and smaller. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability is expected through March.

**Small Oranges:** WATCHLIST Small fruit is very tight and is expected to continue tightening as harvesting is affected by rain and fog.

### West Coast Lettuce

**Iceberg:** ESCALATED Lettuce quality and supplies are just okay, and weights will be light. The market is active, and weather has affected both harvesting and quality. Growers expect the market to continue to rise due to yields being low because of mildew damage and cap leaves. Quality will be hit or miss as we go into February.

Iceberg VA: Quality and supplies are just okay. We have seen reports of short shelf life and mildew in bags.

Romaine & Romaine Hearts: Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, mechanical damage, light weights and mildew on the outer leaves. For the hearts, very little heart material is available.

Romaine VA: Quality and supplies are okay. We have seen more core in the bags and some mildew.

Boston/Butter Lettuce: EXTREME Quality is okay, but supplies are tight. Mildew and fringe burn pressure have been observed, and weather continues to affect harvesting and quality.

Green Leaf, Better Burger and Red Leaf: Quality is good, and supplies have improved. Mildew and fringe burn pressure persist, and carton weights remain light, though conditions are improving.

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#### Florida Weather Update

We saw another round of temperatures near freezing for multiple hours in some districts over the past week, our growers will be assessing damages over the next several days.

Green Bell Pepper WATCHLIST: Lighter supply this week due to cooler weather. Quality is still very good from Nogales, McAllen, and South Florida.

Color Bell Pepper: Lighter volume due to cooler weather. Overall quality will remain good out of McAllen and Nogales.

Mini Sweet Pepper: Supply is steady this week, and quality is good.

Mixed Chili Pepper: ESCALATED Supplies are good out of Sinaloa and Sonora currently. Markets will be shorter this week on Red Fresno, Habanero, and Shishito Pepper. We hope to see improvement next week on the short items.

Tomatillo: Supply and quality are improving this week.

Eggplant WATCHLIST: Domestic supply is very light this week out of Florida due to the cold weather while crossings through Nogales remain strong. Best quality is out of Mexico.

Slicer Cucumbers WATCHLIST: Supply crossing through Nogales and McAllen was lighter this week due to cooler weather. Quality remains strong. Domestic supply will be extremely limited with this week's cold weather in Florida. Honduras will start shipping over the 7 to 14 days.

English Cucumbers: Lighter supply and moderate demand have pushed pricing higher this week out of Nogales and McAllen. Quality is good.

Pickles: Steady crossings through Nogales and McAllen. Quality is good.

Green Beans ESCALATED: Supply got very short out of Florida due to last week's freeze and expect to see volatility over the next several weeks as growers assess potential losses. Markets jumped several dollars, and quality is fair at best on what is available. Mexico is also seeing lighter availability due to cooler weather slowing down production. High demand has also put upward pressure on FOB pricing out of Nogales.

French Beans: WATCHLIST Supplies of both organic and conventional French beans out of Guatemala are fair to good, though container delays continue to impact movement. Mexican conventional French bean availability is fair, with cooler weather continuing to affect yields.

Zucchini/Yellow Squash: WATCHLIST Supply very short in Florida and lighter crossing through Nogales due to cooler weather pushing markets higher. Best quality is out of Mexico.

Herbs: WATCHLIST Basil supply and quality may be inconsistent due to cooler weather, with occasional tip burn possible during the winter months. Tarragon availability remains limited, with fair overall quality. Arugula, Italian Parsley and Cilantro are extremely limited from some growers and prorates should be expected.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Limited	USA
Basil	Very Limited	Marginal	USA/MEX

Opal Basil	Very Limited	Marginal	USA
Thai Basil	Very Limited	Marginal	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Limited	Limited	USA/MEX
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
Italian Parsley	Limited	Limited	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

#### Melons WATCHLIST

Overview: Cantaloupe production will remain steady for another week but will fall off as Guatemala transitions to a different growing region and less Honduras volume entering the ports. Honeydew volume has increased but 8ct remain extremely limited. Weather-related issues during the growing cycle continue to slow down production.

Cantaloupe: Production increased this week, adding a better size profile as well. There are a good mix of 9/12 and jumbo fruit available. The market will have steady supplies for the next two weeks before a slight fall during the transition. Quality overall continues to be good. Brix levels mostly range from 12–14%.

Honeydew: Honeydew production has improved but 8ct only accounts for 1% of production. We expect honeydews to be a challenge for at least the next two weeks, with improvements likely around the week of January 26 arrivals. Flexibility on sizing will be required during this period. Quality has been good with brix levels at 11-13%. Scarring is a common characteristic at this time of year, and mud/dirt will also be seen.

Watermelon: Cooler temperatures in Guatemala has seen watermelon production drop significantly and a shift in size from 45's to 36's. Domestic Watermelons are limited to Florida and are winding down for the season; production will resume in early April. Supply of Mexican watermelons via Texas and Nogales is steady, and quality is good.

#### Mixed Vegetables

Artichokes: ESCALATED Quality is good, but supplies are extremely limited. Growers are holding to strict averages, and there may be some substitutions on sizes. Large sizes are extremely tight, with growers mainly subbing 12ct and 18ct when possible. These sizing issues are expected to last at least through the end of January. Artichokes 24ct are at the extreme trigger.

Asparagus: ESCALATED Mexican production continues to improve across most sizes, with the exception of jumbo. Peruvian production is expected to remain steady through the end of January. With improved availability from Mexico, markets have become less active and are showing signs of easing.

Bok Choy: ESCALATED Quality and supplies are okay

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is okay, but supplies are tightening up. The rain and the warmer weather that Yuma experienced has led to quality issues that will remain for the next few weeks. Reports of browning, pin rot continue. Growers are holding to strict averages for now but prorates should be expected. Organic Broccoli remains at the extreme trigger. Weather has affected harvesting and quality.



Broccolini and Sweet Baby Broccoli: WATCHLIST Quality is good, but supplies are still limited with most growers. Weather has affected harvesting and quality. Growers are holding to strict averages, when possible, but prorates may occur.

Brussels Sprouts: EXTREME Supplies are still limited but are improving. We are still combating insect pressure and internal browning. The market remains at the extreme trigger, but we should start to see some relief in the next 3 to 4 weeks. Growers will be holding to strict averages when they can, but some prorates should be expected. The prorates we are currently seeing are 30 to 40%.

Carrots (JUMBOS, MEDIUMS and CELLOS): Due to continued rain events, supplies are tight on Baby Carrots, Cellos, and Jumbos, with limited availability. Rainbow Carrots remain steady with good quality and supply. Harvesting has been challenging because of muddy fields. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Rainfall has affected harvesting for all of the growers. Cellos and Jumbos are the most heavily impacted. Prorates should be expected. Availability will remain limited until conditions improve (Approx. 2-3 weeks). There are Jumbos available in GA if you could load there. Growers request orders be sent in as early as possible.

Cauliflower: ESCALATED Quality is okay, but supplies are tightening up. The market is now escalated and will likely stay that way for the next few weeks. Organic Cauliflower is at the extreme level.

Celery: EXTREME Quality is okay, and supplies are extremely tight. Weather has affected harvesting and quality, and recent storms are expected to cause prorates on VA items, Quality issues should be expected as they growers work through the affected fields.

Corn, Sweet: WATCHLIST We will see a split market on corn this week due to cold weather in Florida. Markets were higher out of Florida over Mexico. Quality is good out of both regions this week. We will need to assess the quality in Florida after this week's cold weather.

Fennel: ESCALATED 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: Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

Leeks: ESCALATED 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 market are steady.

Green Cabbage: Supplies and quality are good.

Green Onions: EXTREME Supplies are extremely limited, and quality is okay. Some growers have reported being completely out of supplies. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging though January. Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to very strict averages, when possible, but prorates should be expected for at least the next two weeks. Plantings for the next 3-4 weeks were affected by prior rains, and yields are likely to remain an issue until the end of January.

Mushrooms: We are now into our typical holiday pattern, with lower volume and extremely high demand. Supply is expected to be light through the first of the year. Quality is good.

Napa Cabbage: Quality is good, but supplies are tight. The market is increasing.

Parsley (Italian & Curly): ESCALATED Supplies and quality have been affected by recent rains. Prorates should be expected on Italian Parsley. Weather has affected harvesting and quality. Yields are expected to remain challenging throughout January.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

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

Spinach: ESCALATED Supplies remain limited. Reports of weak texture, discoloration, and wilting continue. We are also now seeing disease pressure and mildew which are further impacting yields. Yields are expected to remain challenging throughout January.

Spring Mix: Supplies are limited this week. Weather has affected harvesting and quality, causing additional supply issues. We are also now seeing disease pressure and mildew which are further impacting yields. Yields are expected to remain challenging throughout January.

Snow Peas and Sugar Snaps: ESCALATED We have a few growers struggling with quality and supplies in the Yuma area. This week and next week you may see growers holding to strict averages and there may be some prorates. They expect this to improve in the next 7-10 days. Guatemalan snow pea supplies are fair, while sugar snap availability is being impacted by cold weather. Mexican snow pea and sugar snap supplies remain limited due to recent rain and colder temperatures.

#### Onions:

The onion market remains stable. With harvest concluded, all products will ship exclusively from storage in the Pacific Northwest. While modest increases may occur, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

#### Potatoes:

Potato 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 to ship in limited volume in mid-October, while Norkotahs will continue to make up the majority of supply. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

#### Tomatoes:

##### Tomato Suspension Agreement Update

As we continue to navigate the impacts of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties will be imposed on Mexican tomatoes. We are actively working with each grower partner to gather a breakdown of how duties will be applied for tomatoes imported from Mexico and will provide updates once we have completed the implementation process.

#### East Coast

- Round Tomatoes: WATCHLIST Markets are expected to be firmer this week despite demand being flat as the east prepares for a major winter storm. We do expect to see volatility increase over the coming weeks as the impacts of cold weather in Florida will begin to be realized. Growers are expecting crop loss and bloom drop to drive markets higher by February.
- Roma Tomatoes: ESCALATED Much lighter supply this week and struggling with color as the cold weather has slowed down production. Like the round tomatoes, we expect further volatility and shorter supply over the coming weeks as the impacts of cold weather in Florida will begin to be realized. Growers are expecting crop loss and bloom drop to drive markets higher by February.
- Snacking Tomatoes: ESCALATED
  - Grape Medley, Grape Tomato, Cherry Tomato: Supply was very short this week, and pricing was higher. We are assessing the damages and impacts of the recent cold weather on future plantings.

#### Mexico

- Round Tomatoes: Volume is steady crossing through McAllen and Otay. Quality is good.
- Roma Tomatoes: ESCALATED Lighter supply due to cooler weather and higher demand will keep markets firm this week. Overall, quality is good.
- Snacking Tomatoes:
  - Grape Tomatoes: ESCALATED Lighter supply and higher demand from the east has pushed prices up a tad and expecting that trend to continue this week with the cold weather in Florida. Quality is outstanding.
  - Grape Medley: ESCALATED Supply is tightening up this week, and we continue to see upward pressure with increased demand from the east as Florida is short due to the cooler weather. Quality is good.
  - Cherry Tomatoes: ESCALATED Supply is lighter, and prices were higher this week. Quality remains good.

#### Other Fruit:

Apples: The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

Pears: D'Anjou availability is tight and primarily limited to US #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 US #135–55ct 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: Steady supply available out of California.

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

Cherries: Steady supply available out of Argentina and Chile.

Stone Fruit: Good supply on Peaches currently out of Chile.

Kiwi Fruit: Supplies fair out of California as well as offshore landing on the East Coast.

Quince: Limited supply available this week.