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MARKET REPORT



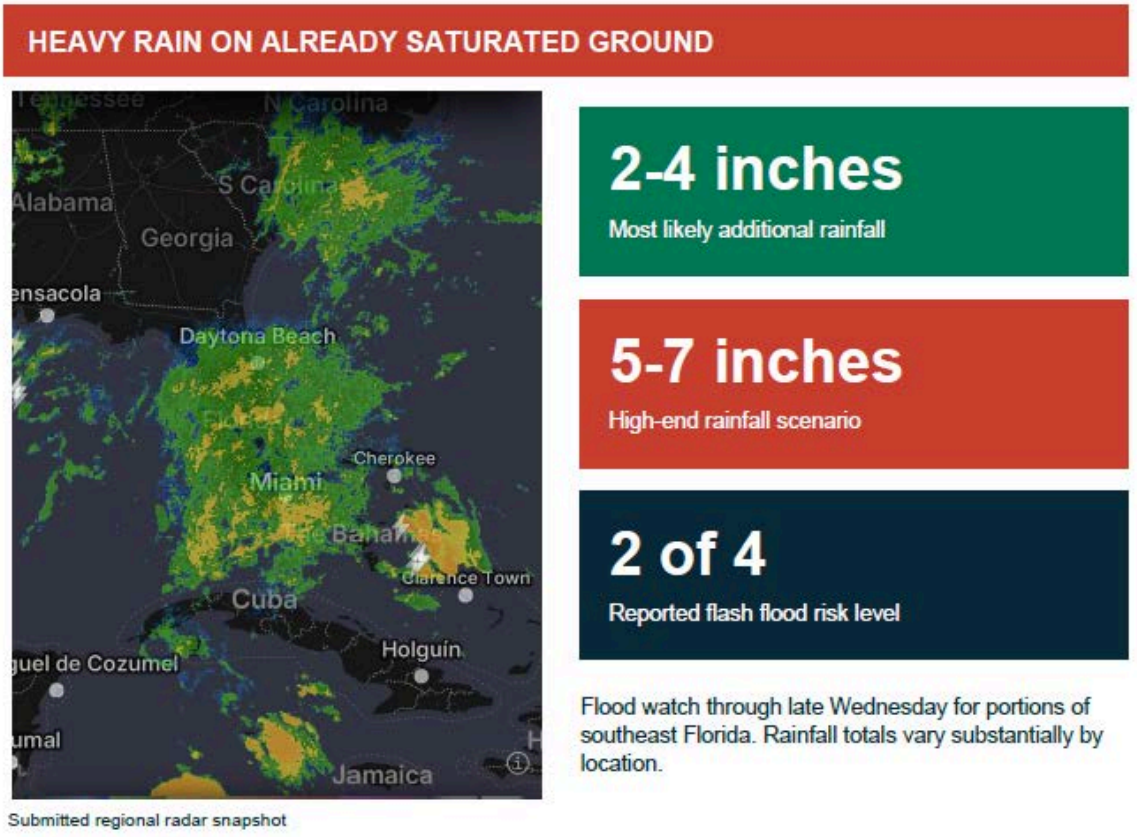
TOMATOES

FLORIDA: A critical national supply region
South Florida is the primary domestic fresh-market tomato supply region at this point in the season, serving both foodservice and retail. With limited alternative supply, repeated storms can severely constrain the volume of usable product entering distribution networks.

Repeated rainfall threatens field access, crop health and marketable yields across Immokalee, Naples and Ruskin. Regional radar shows widespread rain; specific rainfall totals and crop losses for each growing district have not been established.

Market Implications
Expect constrained availability, elevated pricing pressure, variable sizing and quality, and potential order shortfalls across foodservice and retail. Previous market estimates indicate a 65-75% reduction in normal Florida volume; additional storm losses remain undetermined.

Tomato supplies are expected to remain severely impacted throughout December, until Mexico enters its main production period in January.



Submitted regional radar snapshot

Snacking Tomatoes

- **Grape** tomatoes have shot right back up to little to no supply due to weather! Market is currently 70 to 80 on bulk.
- **Cherry** tomatoes are currently gapping for 2 to 3 more weeks.
- Organic **Medley** tomatoes are also gapping for 2 to 3 more weeks.
- Conventional **Medley** tomatoes are the only snacking tomato that is in good supply right now.



Heirlooms

- **Organic Heirlooms:** Harvest out of Mexico continues limited due to ongoing weather patterns and cooler temperatures in growing region. Markets remain strong. Forecasting crop to remain limited through Thanksgiving week.
- **Heirlooms:** steady harvest against “California grown” fall plantings. Origin of Mexico new crops remain delayed due to cooler temperatures in growing region. Markets remain strong.

LETTUCE

- **Iceberg** - market is upinto the mid $70 range FOB out of Salinas. Huron, CA started this week and so far, product is looking nice. INSV and disease continue to be an issue in fields. Demand exceeds supply. Expect the market to remain elevated through Thanksgiving. Yuma is slated to begin mid to late November.
- **Cabbage** - green cabbage is short and ok quality. Red and Napa cabbage is in good supply with decent quality.
- **Romaine** - quality is ok for market conditions. Pricing is high and has potential to continue to rise.
- **Green lead** - disease pressure is causing quality issues. Pricing is up.

BERRIES

Strawberries

- California production volumes remain below normal across all growing regions as fields continue to recover from recent rain events.
- Oxnard is producing primarily smaller-sized fruit, further limiting harvest volumes following significant field stripping over the past several weeks.
- Fill rates are expected to remain challenged, and order cuts will likely continue through the end of the week.
- To maximize transportation efficiency and offset lost truck space, suppliers are encouraged to pre-arrange fill-in items with other row crop commodities.
- Florida is expected to begin shipping meaningful production volumes during the final week of November.
- Market prices remain elevated at **$38.00-$42.00**, with supplies extremely tight as shippers prioritize contract obligations and existing commitments.

Blueberries

- Product remains available from Central Mexico, Peru, and Argentina, with loading points in New Jersey, Florida, Texas, and California.
- Supplies from Peru are tightening as the region moves beyond its peak production period.
- Argentina continues to face weather-related challenges that are impacting both harvest volumes and quality.
- Mexican production remains light but steady, with shipments loading primarily through Texas.
- Markets remain firm, with some growers anticipating a short production gap over the next two weeks

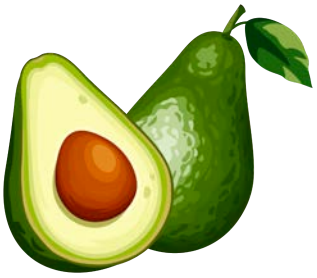
Blackberries

- Central Mexico production continues crossing steadily for loading in both Texas and California.
- Baja volumes are also moving consistently through San Diego.

Raspberries

- Central Mexico production continues crossing steadily for loading in both Texas and California.
- Baja volumes remain steady through San Diego loading points.

AVOCADO



Michoacán harvesting has resumed but remains limited, with only a portion of growers actively participating, which continues to slow the rebuild of inventories after the recent disruption. Jalisco has helped support overall Mexican volume, though some tension has emerged over fruit movement between the two regions. California's season is finished following a solid crop of good quality fruit. The market stays tight with firm pricing expected to continue in the near term as supplies gradually recover; conditions should improve with more consistent harvest activity, though full normalization will take additional time.

VEGGIES

Green & Black Kale: steady prices and supplies on kale this week.

Onion Leeks: steady pricing

Broccoli Crowns: steady/easier with most shippers into good availability

Italian & Curly Parsley: steady supplies on the curly parsley. Italian parsley is higher

Cilantro: steady supplies with availability in the desert and on the coast

Slicer: cucumbers are steady out of Nogales, with quality improving and darker color being reported. Baja is wrapping up its season with production expected to finish by next week

Brussels: steady /slightly easier with most shippers back into some supply

Corn: higher with some shippers coming to an end in Coachella this week. Supplies have been hit or miss lately

Italian & Yellow squash: plenty of volume out of Nogales. Good time to promote

Eggplant: we are seeing more shippers starting up on eggplant out of Nogales. Supply is expected to increase as we move into November

POTATOES & ONIONS

Russet: all carton russets are short and very expensive. Large sized 40-70s are jumping up in price as the Thanksgiving pulls start up. The 5 lb and 10 lb russet bags moved up again this week. Demand on all potatoes will pick up for the holidays and as the temps cool off.

Red & Gold: good supplies on red and yellow potatoes. Good quality and supplies on size A's and B's out of the Northwest. Size C's remain in short supplies and are higher priced.

Chipping: new crop Washington and Idaho are available every day.

Onions: good supplies and quality on all red and yellow onions. Demand is up but the market has stayed the same. Limited supplies on good quality white onions out of California, Nevada and the Pacific Northwest. Freight rates are higher as we approach the holidays and Christmas tree season.

White: size C's are very short. Good quality available on Bs and As though.

CITRUS

Lemon: good availability on all sizes and grades in D1 and D3. Market is soft we can work with you on pricing.

Grapefruit: stars are done and starting grapefruit rubies. Good volume on 32's and smaller

Navels: excellent volume on 88's through 138's on both grades. We have great promotion opportunities.

Limes: peaking on 150 ct. Heavy rain is forecasted in Martinez de la Torre, Veracruz, starting mid-day today and continuing into tomorrow. That will slow harvesting and packing, so total volume will stay tight. The new crop is not projected to begin harvesting until mid-December. While the continued rainfall is benefiting fruit development, much of the fruit remains too small to harvest. We anticipate limited availability until the new crop begins entering the market.

BELL PEPPERS

Bell Peppers: Coachella has limited volume on green bells. No volume on reds; extremely high prices. Very limited on yellow bells until Coachella starts in a week or two.

HH Bells: very limited volume out of Mexico. Price is going up quickly.

CHILI PEPPERS

Current growing regions:

- Chihuahua, Mexico
- Baja, Mexico
- Sonora, Mexico

Extremely limited supply on all chili peppers. Mixed markets due to quality and size.

Jalapeño - limited supply
Serrano - extremely limited supply
Anaheim - good supply
Caribe - extremely limited supply
Red Fresno - gapping until December
Habanero - limited supply
Pasilla - extremely limited supply
Thai Chili - extremely limited supply
Shishito - extremely limited supply
Tomatillo husk & peeled - extremely limited supply
Jicama - limited supply

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