



## Weekly Market Review April 24, 2025

### Overview

**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, a 10% tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.*

We will continue to see strong production out of South Florida on several items, with good quality and availability across multiple commodities with similar conditions being observed in Nogales and McAllen. Stable volume seen across the entire Tomato category as Florida is harvesting new fields as well as Mexico harvesting new regions in Sonora and Baja. Quality is outstanding in all markets. We expect to see Tomatoes start in California early June. The lighter items in supply are Green Beans, premium sized Green Bells, Pickles, Shishitos, Habanero, and Caribe Peppers. We will start to see our first transitions of the season in the west on mixed vegetables; growers will begin harvesting a few peppers, corn and beans picked out of Coachella over the next week. The Offshore Table Grape quality and supply are stable; Mexico is forecasted to start over the next 14 days. Offshore melons are on the backside of the season and volume will steadily decrease over the coming weeks; transition to desert fruit will start in 3-4 weeks. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. The U.S. avocado industry closed last week at 52.4M pounds, representing a 12% decrease from the previous week. Field availability remains skewed toward smaller fruit, with a limited supply of sizes 48 and larger. A high percentage of Grade 2 fruit continues to be reported, and this trend is expected to increase as the season progresses. The Main Crop currently has a dry matter content of 35.1%. In Mexico, no harvesting took place from Thursday through Saturday in observance of Holy Week, resulting in lower volumes this week. While harvest was slow to resume on Monday, activity improved significantly on Tuesday and Wednesday. Looking ahead, Mexico will observe Labor Day on Thursday, May 1, with no harvest scheduled. However, with California harvesting at full capacity and Peruvian volumes expected to double this week, Mexico's one-day pause is unlikely to impact the industry. California harvested approximately 15.9M pounds in week 16, with fruit peaking on sizes 48 and 60 and dry matter averaging 26%. Harvest activity has ramped up in preparation for Cinco de Mayo, and strong volumes are anticipated through July. The Traviesa Crop is well underway, with volumes shipping to both the U.S. and European markets. Volumes appear promising as we enter the peak weeks of the season, with promotional supply anticipated on medium and small sizes. Transition is coming to an end. All of the growers who Transition have moved to Salinas and are settling in this week. It was a little hectic at times, but the growers did an amazing job, and it was a smooth transition. The weather in Salinas has been good so far but there is rain and some warmer temperatures in the forecast. With that combination, insect pressure will be active. Lettuce is looking good and while we have seen some lighter weights and some smaller heads, quality and supplies are improving in Salinas and should continue to improve as everyone settles into Salinas. Brussel Sprouts are still an issue this week and going into next week. We saw a very significant drop in supplies across the industry, and you can expect to see light supplies and possibly shortages for at least the next 2 weeks. Growers are navigating this the best they can and should see some relief in May. Endive, Escarole, Fennel and Parsley remain escalated, with supply shortages driving the market. Bok Choy, Napa, and Leeks remain at the extreme trigger level. Overall production in Salinas is steady and we are off to a great start.









### Alert List

- Asparagus – **ESCALATED**
- Avocados – **ESCALATED**
- Blueberries – **ESCALATED**
- Bok Choy – **EXTREME**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Green Beans – **ESCALATED**
- Herbs – **ESCALATED**
- Hot Peppers (Caribe, Habanero and Shishito) – **ESCALATED**
- Leeks – **EXTREME**
- Limes – **ESCALATED**
- Napa – **EXTREME**
- Parsley (Italian & Curly) – **ESCALATED**









### Watch List

1. Banana and Pineapple
2. Arugula
3. Broccoli
4. Broccolini
5. Brussel Sprouts
6. Cabbage, Green
7. Cabbage, Red
8. Cauliflower-
9. Cilantro
10. French Beans
11. Lettuce, Iceberg
12. Lettuce, Romaine
13. Lettuce, Green Leaf and Red Leaf
14. Pickles
15. Ginger
16. Snow Peas & Sugar Snap Peas
17. Spinach
18. Squash, Yellow
19. Eggplant
20. Small Size Oranges and Lemons









**Weather**  
**SALINAS, CA**

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
60°   50°F	60°   47°F	60°   49°F	56°   48°F	66°   47°F	68°   51°F	66°   51°F	67°   51°F
							
Cloudy	Mostly Cloudy	Cloudy	AM Showers	Partly Cloudy	Partly Cloudy	Partly Cloudy	AM Clouds/PM









**OXNARD, CA**

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
62°   51°F	61°   49°F	60°   47°F	61°   49°F	64°   51°F	68°   53°F	65°   53°F	65°   52°F
							
Cloudy	AM Clouds/PM	AM Showers	Partly Cloudy	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy









**COACHELLA, CA**

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
90°   60°F	86°   56°F	76°   50°F	78°   54°F	87°   62°F	95°   65°F	95°   64°F	94°   65°F
							
Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny









**HERMOSILLO, SONORA**

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
94°   62°F	94°   62°F	94°   60°F	91°   59°F	91°   59°F	93°   60°F	96°   62°F	97°   62°F
							
Sunny	Partly Cloudy	Sunny	Partly Cloudy	Mostly Sunny	Sunny	Sunny	Sunny









**JALISCO, NAYARIT**

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
85°   57°F	84°   57°F	85°   58°F	84°   60°F	83°   59°F	83°   58°F	83°   58°F	85°   58°F
							
Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny









**VIZCAINO, BAJA**

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
94°   60°F	95°   62°F	95°   65°F	94°   66°F	95°   65°F	93°   64°F	95°   63°F	98°   63°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Mostly Sunny	Mostly Sunny









**CULICAN, SINALOA**

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
93°   60°F	97°   62°F	100°   66°F	92°   66°F	94°   66°F	93°   63°F	96°   63°F	99°   62°F
							
Mostly Cloudy	Partly Cloudy	Mostly Cloudy	Cloudy	Mostly Cloudy	Partly Cloudy	Mostly Sunny	Sunny

**IMMOKALEE, FL**

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
91°   64°F	91°   63°F	92°   63°F	94°   64°F	93°   67°F	91°   66°F	91°   67°F	92°   67°F
							
Mostly Sunny	Mostly Sunny	Mostly Sunny	Sunny	PM Thunderstorms	Mostly Sunny	Mostly Sunny	Mostly Sunny

#### LAKE PARK, GA

Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Mon 4/28	Tue 4/29	Wed 4/30	Thu 5/1
90°   63°F	90°   63°F	91°   65°F	93°   65°F	88°   65°F	90°   65°F	91°   66°F	91°   66°F
							
Mostly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	PM Thunderstorms	Partly Cloudy	Partly Cloudy	Mostly Cloudy

#### 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, a 10% tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.

**Avocados: ESCALATED** The U.S. avocado industry closed last week at 52.4M pounds, representing a 12% decrease from the previous week. Field availability remains skewed toward smaller fruit, with a limited supply of sizes 48 and larger. A high percentage of Grade 2 fruit continues to be reported, and this trend is expected to increase as the season progresses. The Main Crop currently has a dry matter content of 35.1%. In Mexico, no harvesting took place from Thursday through Saturday in observance of Holy Week, resulting in lower volumes this week. While harvest was slow to resume on Monday, activity improved significantly on Tuesday and Wednesday. Looking ahead, Mexico will observe Labor Day on Thursday, May 1, with no harvest scheduled. However, with California harvesting at full capacity and Peruvian volumes expected to double this week, Mexico's one-day pause is unlikely to impact the industry. California harvested approximately 15.9M pounds in week 16, with fruit peaking on sizes 48 and 60 and dry matter averaging 26%. Harvest activity has ramped up in preparation for Cinco de Mayo, and strong volumes are anticipated through July.

**Bananas: WATCHLIST:** Banana imports remain light but will improve slowly over the coming weeks as more vessels arrive from the Tropics. A combination of cooler and poorer-than-desired weather in the tropics as well as logistic challenges impacted the global supply over the past three weeks. We could see minor pro-rates across the network but that should subside this week. Overall, banana quality has been good despite being in the winter cycle. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to store fruit in warmer locations or wrap fruit. With inventories being light, we see higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival.

**Pineapples: WATCHLIST** Pineapples will remain tight and are not expected to show any type of improvement until late May. We are suggesting flexibility in sizes to ensure stability of the supply chain. Overall quality and taste are good.

**Table Grapes:** Stable supply is available on colors and varieties. Mexico is expected to start in 2 weeks.

#### Berries

**Strawberries:** Supplies remain lighter this week due to continued cooler temperatures, which have also contributed to increased fruit sizing. Green fruit sets remain strong in Santa Maria, and production is expected to ramp up significantly as harvest crews transition to piece-rate picking. The region is on track to reach peak production between mid-to-late April and early May, with later-planted blocks likely extending into June. In Oxnard, volume is expected to build steadily, supported by favorable weather that is driving a flush in supply. The region is projected to experience a brief peak in late April, followed by a rapid decline as growers begin transitioning to the Salinas/Watsonville region. Salinas/Watsonville is forecasted to gradually increase production over the coming weeks. With no disruptive weather in the forecast, more consistent volumes are anticipated moving forward.

**Blackberries:** Quality remains strong, with medium to large sizing, good sheen, and firm, mostly black fruit. However, there are some quality concerns, including red cell regression, attached calyx, and occasional soft or leaking fruit. Volume is holding steady at a consistent peak and is expected to continue through the end of July. On the organic side, volumes have begun to decline, as the season is wrapping up slightly earlier than anticipated.

**Raspberries:** Overall volumes are expected to gradually increase, trending upward toward the spring peak in late May and early June. Both Baja and California are projected to maintain an upward trajectory as they move toward their seasonal peaks. In contrast, Mexico is expected to remain stable over the next month, followed by a gradual decline through the remainder of the season.

**Blueberries: ESCALATED** Overall volume remains well below expectations. While the industry appears to have moved past the seasonal low point, meaningful improvements are not anticipated until mid to late May. Mexican volume is declining more rapidly than expected, and Florida has fallen short due to ongoing quality issues. In Georgia, the season has been delayed by several weeks, likely due to early-season weather challenges. Growers reported their first light harvest this week, with a modest increase expected by the end of the week and further volume growth anticipated toward the end of next week. In the Central Valley, production is also running behind schedule, with light harvesting expected to begin sometime next week.

### Citrus

**Oranges:** Fruit quality remains excellent and offers great eating quality. Pricing on 88's and smaller, primarily 113's and 138's, continues to strengthen as the size structure is now trending heavier to larger sizes. Ample lead time will be necessary to place orders, especially on small sizes, with many shippers now holding to averages.

**Lemons:** We continue to see very good quality out of all growing areas in California. Most shippers are reporting small sizes, 165's and smaller, becoming extremely light in supplies and will continue for the next 4 to 6 weeks, while mid-to-larger sizes, 140's and larger, remain readily available. The market is stronger on smaller sizes. Ample lead time will be necessary to place orders, especially on small sizes, with many shippers now holding to averages.

**Limes: ESCALATED** Available supplies remain light this week and are expected to stay limited into next week. Shippers are currently catching up from reduced availability during Holy Week. Looking ahead, overall supply will remain tight while demand increases for Cinco de Mayo and as a result, expect the market to trend higher. In addition, sizing continues to peak on smaller fruit—primarily 200s, 230s, and 250s—while larger sizes remain limited. We anticipate the strong market to continue for at least the next few weeks, especially leading up to the Cinco de Mayo holiday.

**Imports/Specialties:** Blood Oranges are still being packed but will be finishing for the season between the middle to end of May. Sizing is running small. Cara's are also available and will be finishing mid-to end of May. California Mandarins are in good supply with very good quality. California Grapefruit is available with light supplies on Fancy grade; choice grade are readily available.

### West Coast Lettuce

**Iceberg: WATCHLIST:** Lettuce supplies are good. You can still expect lighter weights and smaller heads from some growers until everyone is settled into Salinas, but overall quality is good.

**Iceberg VA:** Quality and supplies look good

**Romaine & Romaine Hearts: WATCHLIST** Romaine and Romaine heart supplies are good, but the market is trending higher due to increased demand. Due to the warmer weather, insect pressure and light blistering have been reported. Organic Romaine hearts are no longer escalated.

**Romaine VA:** Quality and supplies are good

**Green Leaf and Red Leaf WATCHLIST:** Overall quality and supplies look good. Weights and sizing are improving.

### Eastern and Western Vegetables:

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**Green Bell Pepper:** Seeing short supply in Nogales, particularly on large sizes. Coachella is scratching this week. South Florida is still seeing higher prices on premium sizing while choice fruit is plentiful; we should transition to South Georgia around the 10<sup>th</sup> of May.

**Color Bell Pepper:** Good supply available in Nogales and South Florida. Quality is mostly good. Canada started crossing limited volume on HH Bells and this will gradually increase over the coming weeks. We should see some La Rouge yellow and reds out of the desert as well as South Georgia by mid-May.

**Mini Sweet Pepper:** Supply stable this week loading in Nogales and Florida.

**Mixed Chili Pepper: ESCALATED** Supplies in general are good across most varieties out of Mexico, but quality is mixed. We should scratch new fields in Sonora over the coming weeks which will improve supply and quality. Jalapeño and Poblano were good this week. Caribes, Habanero and Shishito were shorter this week. California should start production in early June and South Georgia by the 2<sup>nd</sup> week of May.

**Eggplant:** Lighter domestic supply continues, and quality is mixed. Good supply and excellent quality out of Mexico this week. South Georgia and California should start the 3<sup>rd</sup> week of May.

**Slicer Cucumbers:** Lighter supply crossing through Nogales and McAllen as well as Honduras. We are seeing short supply, particularly on selects and supers. Quality is good and Markets were firmer this week due to transition; we expect to see better volume in two weeks. South Georgia is expected to start May 10<sup>th</sup>.

**English Cucumbers:** Good supply available this week crossing from Mexico. Quality on new crop out of Mexico was good.

**Pickles: WATCHLIST** Lighter supply available crossing through Nogales and we may see some shorts on market buys as contracts are getting priority on volume. Quality is outstanding.

**Green Beans: ESCALATED** Very light supply continues post-Easter Holiday out of Mexico as well as Florida as seasonal crops wind down. We will see variances in quality out of the East as growers pick from blocks that were impacted by weather earlier this year in the South. Quality and volume should improve over the next 2-3 weeks once transition gets underway to Coachella and South Georgia.

**French Beans: WATCHLIST** Production in Guatemala has declined due to a lack of rainfall, while ongoing vessel delays continue to impact shelf life. In contrast, Mexico is reporting good supply levels of French Beans, with stable availability.

**Zucchini/Yellow Squash:** Good volume and quality available shipping from all locations on Italian and Yellow from Mexico and Florida. Georgia should ramp up early next week and California is still a few weeks out.

**Herbs: ESCALATED** In the eastern regions, basil and mint quality has been impacted by ongoing rain in Colombia, while the supply of imported chervil is down due to adverse weather conditions in Ecuador. On the West Coast, basil supply and quality are gradually improving, though the recovery has been slower than anticipated. Continued improvement is expected in the coming weeks as weather conditions stabilize across key growing regions. Arugula and Cilantro are also in limited supply due to frost damage, resulting in small, uneven bunches, purple stems, and mechanical issues. Some growers are implementing proring because of these challenges.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Marginal	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	Marginal	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	Steady	Steady	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:** Stronger retail demand and delayed vessels have quickly shortened the cantaloupe market. FOB pricing remains firm this week. We do expect transition from our offshore program to the desert on May 19<sup>th</sup>. Fields are not sizing up as expected and we feel we will see the crop break with smaller sized fruit.

**Cantaloupe:** Quality is excellent and fruit shelf life is strong with extended shelf life and high shell color. Brix levels are holding mostly in the 14-16% range that has been seen in recent weeks; sizing profile will be heavy sizes (5-6's to 9's) while 12's and 15's will be limited.

**Honeydew:** Honeydew production will drop off this week with sizing still strong leaning to 5s-5Js; 6ct has been extremely limited. We are seeing a bit more scar, but overall quality has been solid. Brix levels are mostly in the 12-14% range.

**Watermelon:** Watermelon supplies are lighter, and demand is strong out of Mexico and Florida. Smaller sizes will remain tight, and new fields are producing mostly larger fruit. Prices are expected to stay strong on binds and cartons. There are some deals available on 11ct minis.

#### **Mixed Vegetables**

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**Artichokes:** Quality and Supply are good.

**Asparagus: ESCALATED** Caborca and San Luis volumes remain low, driven by ongoing heat and seasonal decline. Meanwhile, Peruvian volume continues to build steadily week over week. With Easter demand now behind us, markets are showing reduced activity this week.

**Bok Choy: EXTREME** Quality is good, but supplies are still limited. The light supplies are driving the market.

**Broccoli/Broccoli Crowns: WATCHLIST** Quality and supplies are steady.

**Broccolini and Sweet Baby Broccoli: WATCHLIST** Quality looks good, and most growers are looking good on supplies.

**Brussels Sprouts: WATCHLIST** Quality and supplies are an issue with the majority of growers right now. The industry supply has dropped significantly. You can expect to see shortages and for the market to rise. Growers are trying to cover 10-week averages.

**Carrots (JUMBOS, MEDIUMS and CELLOS):** The Desert growing regions have started with good supplies and very good quality. Expect steady supplies through the end of the desert season which will run into late April or early May.

**Cauliflower: WATCHLIST** Quality and supplies are steady.

**Celery:** Quality and supplies are looking good.

**Corn, Sweet:** Excellent supply out of Coachella and Brawley has started while volume remains steady out of Florida. Mexico is just about done for the season. Domestic quality is good.

**Fennel: EXTREME** The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve.

**Kale: WATCHLIST** Supplies have improved, and quality is good, but we are keeping it on the watchlist due to the possibility of insect pressure.

**Leeks: EXTREME** Leeks are very tight right now and some growers are holding to averages. The market remains escalated.

**Garlic:** California Garlic is showing very good quality with lighter supplies. Demand is good.

**Ginger:** Supplies and market are steady.

**Green Cabbage: WATCHLIST** Supplies and quality look good.

**Green Onions:** Supplies and quality look good but there have been some initial reports of light supplies.

**Mushrooms:** Promotable volume available and quality is good.

**Napa Cabbage: ESCALATED** Quality and supplies are improving but there is some insect pressure.

**Parsley (Italian & Curly): ESCALATED** Supplies and quality look good.

**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 is good, but supplies are still light with some growers. The market remains very active.

**Spinach: WATCHLIST** Supplies, and quality are good. We have seen some reports of weak texture, discoloration, wilting and there have been some insect damage but it is all minimal right now.

**Snow Peas and Sugar Snaps:** Guatemalan snow pea and sugar snap production remains stable; however, quality concerns may arise due to persistent humidity in the growing regions. In Mexico, production of both snow peas and sugar snaps continues at a steady pace.

#### Onions:

The onion market is not expected to react much until the Northwest is entirely out of the picture. At this point, we do not anticipate that it would take place until May. Even then, there may still be some leftover product floating around in that region. Texas onions are just getting going and they are expected to have a big crop. Additionally, Southern California will start in about 4 weeks, and they are also expected to have a lot of product. So, the first 2 months of Q2 (April/May) there is not presently a lot of optimism. However, June is a bit of a wildcard. At that point, Texas is done, the Northwest is done, Southern Cal will be mostly finished, and we will be exclusively into New Mexico and Central California at that time. It is basically a fresh start during that time period, so the market has as good of a chance of improving as it does staying stagnant.

#### Potatoes:

The market remains stable, though carton production is starting to decline. With Norkotahs expected to phase out over the next 3-4 weeks, supply will shift solely to Burbanks, leading to a notable drop in production. As production decreases, we anticipate some market increases. However, if demand increases, the market could strengthen significantly, though that remains uncertain. Planting for the upcoming season will take place throughout April, with acreage expected to be similar to the current year. Given the depressed market conditions this season, there is some concern about similar supply levels next year, particularly if yields remain consistent.

#### Tomatoes:

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#### **East Coast**

- **Round and Roma Tomatoes:** Florida is peaking on production of rounds and Romas. Quality is outstanding.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Stable supply available and quality is outstanding.

#### **Mexico**

- **Round Tomatoes:** Steady volume out of Sonora and Sinaloa on all sizes; Quality is outstanding.
- **Roma Tomatoes:** Ample supply from Sonora and Sinaloa are crossing through Nogales and McAllen. Quality is good.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Steady supply and light demand have put downward pressure on FOB pricing, quality remains good.
- **Tomato on the Vine:** Stable Volume available this week.

#### **California**

- Forecasted to start in early June.

#### Other Fruit:

**Apples:** Organic Apple and Honeycrisp supplies remain extremely limited out of Washington. Pricing has risen significantly and is expected to continue increasing until the next harvest.

**Pears:** The Northwest Pear Crop (Washington/Oregon) is substantially down from last season due to below-average temps in late Feb/early March affecting bud development. The higher elevation areas in Washington were severely impacted, especially the Wenatchee Valley. The Oregon Growing Region was not affected as much as Wenatchee, Washington, but it was still impacted.

The Bartlett Crop out of the Northwest shows 3.8 million shipped last season vs a projected 2.9 million this year for a 14% decrease. It's not substantial in terms of overall volume, but it's still a factor. The cold temperatures will affect the grade, so more Fancy's will be packed than normal. Because the crop is smaller, the size profile has increased by 1 to 2 sizes. Barts to finish by the end of February/beginning of March.

Anjous report at least a 30% total decrease, or 1.85 million boxes less than last year. Also, out of the Wenatchee Valley, there will be more fancy and, for the first time in many years, a 3rd grade Anjous packed. When we start to pack Anjous—this will be your value pear. Anjous to start the week of September 16th, and if growers make it through June, I will be surprised.

Red Anjous are down 7% or 47,000 boxes, so it is nothing dramatic like the others. The question on Red Anjous is whether or not we will see smaller pears such as 120/135 cts. Red pears are supposed to be 1 to 2 sizes larger out of the PNW. Red pears have started with Starkrimsons and will transition into Red Anjou from November through May.

Bosc are down 63% out of the great Northwest, or 1.38 million boxes. This variety was mostly affected, and markets will be much higher than in previous years. Bosc has slowly started with a potential end date last January/middle of February.

**Pomegranate:** Limited availability.

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

**Cherries:** Limited Supply Available.

**Tree Fruit:** Offshore Peaches, Plums and Nectarines in limited supply.

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

**Quince:** Limited supply available this week.