



Weekly Market Review May 15, 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 are seeing lighter production out of South Florida due to a combination of seasonal availability winding down combined with rain delays on several items this week. In Nogales and McAllen, we are seeing transitions well underway, particularly on Tomatoes as Sinaloa wraps up for the season and productions moves to Sonora, Jalisco and Baja. Markets ticked up this week on Romas and Rounds due to this, fortunately we are not seeing any supply issues. Quality remains strong on new crop out of Mexico and Florida may see some issues due to rain. We expect to see Tomatoes start in California, South Carolina and South Georgia early June. Mixed veg transitions are well underway to California and South Georgia. Good production available on Corn and Green Bells out of Coachella this week and quality is outstanding. New crop Slicer Cucumber is ramping up out of Georgia and Baja. Items that remain light in supply are premium sized Green Bells, Pickles, Shishito Pepper, Tomatillo and Habanero. The offshore Table Grape quality and supply are stable; Mexico is forecasted to start over the next 7 to 10 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 over the next 10 to 14 days. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. Banana supply will be volatile over the next several weeks due to a labor strike in Panama impacting the global supply chain. We do not expect major shortages at this time and are keeping a very close eye on this situation. New crop available out of California on yellow/white Peaches, Cherries and Apricots, there are also Peaches available in the east out of Georgia and South Carolina; volume will gradually increase over the coming weeks. Plums are still a few weeks out. Total volumes into the U.S. are expected to remain stable through early June. However, over the next four weeks, Mexico will continue to relinquish market share to Peru. Year-over-year data highlights this shift—Mexico's volume is down 16% compared to 2024, while all other countries of origin have posted significant increases. This trend signals a notable departure from summer 2024, when offshore volumes were far more limited. Peru's arrivals are ramping up through May, positioning the region to play a central role in summer supply programs. Offshore fruit will be key in supplementing total volume, especially as production out of Mexico tapers off. A high percentage of Grade 2 fruit continues to be reported from Mexico, a common characteristic of the late season. Mexico is also preparing for a crop transition, with the Off-Bloom (Loca/Mendez) crop set to begin around its traditional July 1st start. Transitions typically bring some volatility, but the industry remains cautiously optimistic about stability through the summer. APEAM has released crop projections for 2025–2026, with Jalisco's Mendez Crop is forecasted to increase by 7.8%, and Michoacán's Loca Crop is expected to rise by 19.6%. Meanwhile, California harvests remain steady, with excellent fruit quality and consistent supply. Market conditions are currently stable, and demand is expected to build ahead of Memorial Day promotions, supporting firm pricing across most sizes. The majority of the wet veg items are doing very well in Salinas. We continue to see nice Spring weather and have seen minimal insect pressure so far. We will keep an eye on that and report any issues. Lettuce supplies are looking good, and the weights all seem to be back to normal. Leafy Greens, Broccoli and Cauliflower all also look good right now. The one major issue continues to be the Brussels Sprouts. You will continue to see light supplies and some quality issues throughout the month. Jumbos are still very limited, and sizing is leaning more towards small and medium. Growers are navigating this the best they can, but for now, the market is escalated to the extreme level and will stay that way until supplies improve. Endive, Escarole, Fennel. Leeks and Parsley remain escalated, with supply shortages driving the market. Bok Choy and Napa are no longer at the extreme level but are still escalated. Overall production in Salinas is still steady, and we are hopeful for a great season!









Alert List

- Avocados – **ESCALATED**
- Bananas – **ESCALATED**
- Bok Choy – **ESCALATED**
- Brussel Sprouts – **EXTREME**
- Celery Organic – **EXTREME**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Hot Peppers (Caribe, Habanero and Shishito) – **ESCALATED**
- Leeks – **ESCALATED**
- Limes – **ESCALATED ON SMALL SIZES
EXTREME ON LARGE SIZES**
- Napa – **ESCALATED**
- Parsley (Italian & Curly) – **ESCALATED**
- Tomatoes- **ESCALATED**









Watch List

1. Asparagus
2. Pineapple
3. Cabbage, Red
4. Celery
5. Cilantro
6. French Beans
7. Herbs
8. **Lemons – SMALL SIZES**
9. **Oranges – SMALL SIZES**
10. Pickles
11. Pineapple
12. Ginger
13. Green Onions
14. Romaine
15. Snow Peas & Sugar Snap Peas
16. Spinach
17. Squash, Yellow
18. Eggplant
19. Small Size Oranges and Lemons









Weather
SALINAS, CA

Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18	Mon 5/19	Tue 5/20	Wed 5/21	Thu 5/22
65° 51°F	64° 53°F	61° 51°F	66° 49°F	72° 53°F	69° 49°F	73° 53°F	75° 53°F
							
Partly Cloudy	Partly Cloudy	Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny









OXNARD, CA

Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18	Mon 5/19	Tue 5/20	Wed 5/21	Thu 5/22
67° 53°F	65° 55°F	62° 53°F	65° 54°F	71° 57°F	75° 58°F	76° 60°F	76° 59°F
							
Mostly Sunny	Mostly Cloudy	Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny









COACHELLA, CA

Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18	Mon 5/19	Tue 5/20	Wed 5/21	Thu 5/22
94° 66°F	96° 67°F	92° 61°F	89° 65°F	97° 69°F	101° 73°F	106° 76°F	107° 76°F
							
Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









HERMOSILLO, SONORA

Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18	Mon 5/19	Tue 5/20	Wed 5/21	Thu 5/22
95° 64°F	96° 66°F	95° 63°F	92° 63°F	93° 65°F	101° 69°F	105° 72°F	106° 72°F
							
Mostly Sunny	Partly Cloudy	Mostly Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Sunny









JALISCO, NAYARIT

Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18	Mon 5/19	Tue 5/20	Wed 5/21	Thu 5/22
91° 60°F	89° 62°F	87° 62°F	86° 61°F	86° 61°F	87° 60°F	87° 62°F	87° 63°F
							
Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Mostly Sunny	Mostly Sunny









VIZCAINO, BAJA

Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18	Mon 5/19	Tue 5/20	Wed 5/21	Thu 5/22
102° 68°F	102° 68°F	100° 68°F	99° 65°F	99° 64°F	100° 65°F	99° 67°F	99° 68°F
							
Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Partly Cloudy

CULICAN, SINALOA

Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18	Mon 5/19	Tue 5/20	Wed 5/21	Thu 5/22
102° 68°F	105° 69°F	103° 68°F	101° 65°F	99° 62°F	99° 64°F	99° 67°F	99° 67°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Sunny	Mostly Sunny	Sunny	Sunny

IMMOKALEE, FL

Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18	Mon 5/19	Tue 5/20	Wed 5/21	Thu 5/22
94° 68°F	95° 70°F	95° 71°F	95° 72°F	96° 72°F	96° 73°F	95° 74°F	94° 71°F
							
Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Sunny	Mostly Sunny	Partly Cloudy

LAKE PARK, GA

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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 Overall markets saw a decrease across all sizes. Last week closed at 61.3M pounds for the U.S. avocado industry—an increase of 6% from the previous week. Volumes harvested and shipped remained relatively stable before and after Cinco de Mayo. Despite strong AD count activity surrounding the holiday, the market continues to follow a downward pricing trend. This week, similar volume levels are anticipated across all countries of origin. Jalisco currently accounts for 7.5% of Mexico's shipments to the U.S., with field availability skewed toward smaller sizes and a high percentage of Grade 2 fruit. The Main Crop's current dry matter is estimated at 36%, with approximately six weeks remaining in the 2024–2025 season. Approximately 13.5M pounds were harvested in Week 19.5 out of California, with dry matter averaging 27.4%. Sizing continues to peak in the 48s, followed by the 60s. California harvest is in full swing, with steady volumes expected to continue throughout the summer. Fruit quality remains excellent. The Traviesa Crop is progressing well, with shipments moving to both U.S. and European markets. Weather permitting, volumes look strong heading into the peak weeks of the season. Promotional opportunities are expected, particularly on medium and small fruit sizes.

Bananas: ESCALATED Banana imports remain extremely light for the next 4 weeks. We continue to struggle with several challenges of recent including record demand and overall lighter supply from the tropics. We are also seeing some logistical challenges due to the labor strikes in Panama that are impacting the global supply. Due to these challenges, we could see minor pro-rates across the network over the next four weeks. Overall, banana quality has been good and improving as we enter the summer grow cycle. Overall inventories are light, and we are seeing higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to keep a heavier than normal inventory on hand and self-manage color to protect from shorts.

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 over the next week to 10 days.

Berries

Strawberries: Overall volumes are improving with better weather. In Santa Maria, temperatures rose into the upper 60s, with overnight lows in the low 50s. Forecasts call for stable weather with no rain and highs reaching the low 70s. Fruit quality held up well, with only 5–10% of ripe fruit showing minor water damage thanks to early harvests at light color stages and proactive fungicide use. While some minor tip issues persist, overall quality is strong, and with warming temperatures, production is expected to increase again in the next one to two weeks, and last week marked peak production for many blocks, which should hold through this week before tapering. Organic volumes are building steadily, with peak levels expected between next week and early June, supporting strong supply into late June. Meanwhile, the Watsonville/Salinas region experienced similar but colder weather, with dry fields and highs in the low 60s and lows in the mid-40s. Conditions are expected to improve next week, with highs approaching the upper 60s to low 70s. Cold weather has preserved excellent quality, though some bruising and dry calyxes are present in certain varieties. Organic fruit is slightly behind conventional in size but maintaining strong quality, with production estimates increasing weekly and a seasonal peak anticipated in June. All pack sizes are currently available with strong volume, excellent sizing, and consistent quality.

Blackberries: In Mexico, weather conditions are currently hot with significant temperature swings—highs in the 80s to 90s and lows in the 50s—as the region enters its hottest period before June rains. Blackberry quality remains good, with medium to large sizing, strong sheen, mostly black color, and good firmness. However, the high heat has led to some issues, including red cell regression, attached calyx, and occasional soft or leaking fruit. Volume is steady but currently in a production dip expected to last through early May, with peak volumes anticipated from late May through June. Organic blackberry production is expected to resume in early May with small volumes, ramping up toward the end of the month. In Watsonville, conventional blackberry production is projected to begin next week, with organic production following in June.

Raspberries: In Mexico, current weather conditions are hot with significant temperature swings—highs reaching the 80s to 90s and lows in the 50s—as the region enters its hottest stretch before June rains. Fruit quality remains strong with good red color, solid firmness, and mostly medium sizes, though occasional larger berries are present. Some overripe and crumbled fruit is being observed due to the heat, but crews are working diligently to exclude affected fruit from packs. Raspberry volume is currently in a dip but is expected to increase steadily through May, followed by a brief slowdown in late May to June before picking back up again in July and August. Organic raspberry volume is anticipated to resume next week. In Watsonville, conventional production is projected to begin in July, with no organic volume expected from this region this season.

Blueberries: Overall supplies continue to increase. Out of Mexico, the current weather is hot with wide temperature swings—highs in the 80s to 90s and lows in the 50s—as the region moves through its hottest period ahead of June rains. Conventional blueberry volume is declining weekly, with the season expected to wrap up by July. Organic production is anticipated to resume in August. Overall quality remains good, with strong flavor, bloom, and appearance. However, some issues are present, including redberries, soft or leaking fruit, and shriveling due to heat. Slightly warmer temps this week in Oxnard, with highs in the low 70s and lows in the 50s. Organic blueberry production has passed its peak and will decline steadily until the season ends in late May. Quality remains excellent, with strong size, bloom, and flavor. The weather has been hot, with highs in the upper 80s and lows in the 60s in Florida. The region is currently at the peak of its production curve, but volumes remain 30–50% below original estimates due to earlier hurricanes, storms, and heat waves. Only conventional fruit is being harvested, and while volume is reduced, quality has been excellent. Similar to Florida, Georgia

experienced continued warm weather this week, with highs in the 70s to 80s and lows in the 50s. The region is producing conventional fruit, with peak production expected shortly. However, yields are also down 30–50% from original forecasts due to prior weather events. The season is expected to end quickly in early June. Open market volume is limited. Conditions have been hot and sunny in the Central Valley, with highs in the 80s and lows in the upper 50s. Warm weather accelerates both organic and conventional production. Organic volume is ramping up quickly, with peak production expected in the next one to two weeks and continuing through mid-June. Initial conventional pickings have begun, and quality looks excellent. Peak conventional volume is expected toward the end of May. Open market availability remains limited. Production in Oregon, Washington, and British Columbia is expected to begin around July.

Citrus

Oranges: WATCHLIST ON SMALL SIZES Quality remains very good with good demand. 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. In addition, the Navel season is expected to finish in early to mid-June depending upon the shipper. We are starting to see a few Valencia's being harvested, with very light availability on Valencia's towards the end of May with most shippers expected to start in mid-June. Early projections are for the Valencia crop to be lighter in volume this year compared to last year with the early fruit being smaller in size and large sized volume increasing as we move through the early summer months.

Lemons: WATCHLIST ON SMALL SIZES We continue to see very good quality out of all growing areas in California with most shippers. 165's and smaller will continue to be in extremely light supply for the next 4 to 6 weeks, while mid-to-larger sizes, 140's and larger will be available although 140's are becoming short in availability due to light volume on smaller sizes. The market is stronger for smaller sizes. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers now holding to averages.

Limes: ESCALATED ON SMALL SIZES & EXTREME ON LARGE SIZES Extreme shortages on large sizes (110's, 150's and 175's) continue as the high temperatures in the growing areas have accelerated fruit maturation, leading to a prevalence of smaller-sized limes (200's, 230's and 250's) with an extreme shortage on large sizes. The market remains elevated on large sizes and is expected to remain elevated for the next few weeks with increasing concern about fruit quality.

Imports/Specialties: Blood Oranges are still being packed but will be finishing for the season this month. Sizing is running small. Cara's are also available and will be finishing this month as well. California Mandarins are in good supply with very good quality. California Grapefruit is available with light supplies on Fancy grade; choice grade is available.

West Coast Lettuce

Iceberg: Lettuce supplies, and quality are good.

Iceberg VA: Quality and supplies look good.

Romaine & Romaine Hearts: WATCHLIST Romaine and Romaine heart quality and supplies are good. There have been some reports of fringe burns and light cupping. Insect pressure could become an issue as we get into Spring weather. We have also had some initial reports of small amounts of INSV and sclerotinia in some of the romaine fields. We are adding this to the watchlist as we monitor that situation.

Romaine VA: Quality and supplies are good.

Green Leaf and Red Leaf: Quality and supplies look good.

Eastern and Western Vegetables:

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Green Bell Pepper: Seeing short supply in Nogales, particularly on large sizes. Coachella is now in full production with good supply on all sizes with larger sizes catching a premium. South Florida is still seeing higher prices on premium sizing while choice fruit is plentiful; we should transition to South Georgia around the 10th of May.

Color Bell Pepper: Good supply available in Nogales and South Florida. Quality is mostly good. Canada volume on HH Bells is good and quality is outstanding. 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 lighter this week. Habanero, Tomatillo and Shishito will be the shortest and could see some supply interruptions. California should start production in early June and South Georgia over the next 7 to 10 days.

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 3rd week of May.

Slicer Cucumbers: Lighter supply crossing through Nogales and McAllen as well as Florida. We are seeing very light supply on supers and plains. Quality is good and markets were firmer this week due to transition; we expect to see better volume in two weeks. South Georgia production has begun...quality is good.

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: Good Supply available with new crop beans coming available out of Georgia and Florida. Coachella should ramp up over the next week. Quality is good.

French Beans: WATCHLIST Steady supplies are available at this time with improved availability. Supplies and demand should remain steady through next week. Overall good quality. Prices are generally unchanged. In contrast, there is a strong supply of French Beans out of Mexico, helping to offset some of the regional shortfalls.

Zucchini/Yellow Squash: Good volume and quality available shipping from all locations on Italian and Yellow from Florida; we have started production in South Georgia with volume ramping up and good quality. Volume out of Nogales is winding down for the season and will transition to California and Baja.

Herbs: WATCHLIST In the eastern regions, Basil quality remains challenged due to ongoing rain in Colombia, though supply and quality are gradually improving, albeit slower than anticipated. Imported Chervil volume is limited as adverse weather in Ecuador continues to impact production. Out of the western regions, supply and quality remain steady. Both should continue improving as the weather improves.

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 offshore cantaloupe market. FOB pricing remains firm this week. We do expect transition from our offshore program to the desert on May 19th. Volume is going to decrease daily on offshore fruit with limited availability on open market sales. Bin Athena Cantaloupe is available out of Florida and cartons are available out of Mexico.

Cantaloupe: Quality is excellent and fruit shelf life is strong with extended shelf life and high shell color. Brix levels are mostly in the 14-16% range that has been seen in recent weeks; sizing profile will shift to more 6's and 9's 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 scars, but overall quality has been solid. Brix levels are mostly in the 12-14% range. We may see a bit more Mexican fruit available in the market.

Watermelon: Watermelon are improving but demand remains strong loading 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 bins and cartons. There are some deals available on 11ct minis.

Mixed Vegetables

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Artichokes: Quality and Supply are good.

Asparagus: WATCHLIST Asparagus supplies have improved with increased volume out of Peru, and the full transition to Peruvian production last week. Domestic harvest has started in Washington with minimal volumes, and Michigan is expected to come online in the next 5-7 days. Market trends point downward heading into next week, and quality remains generally good. However, White Asparagus volume out of Peru is beginning to decline due to seasonal shifts and ongoing field transitions.

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

Broccoli/Broccoli Crowns: Quality and supplies are good.

Broccolini and Sweet Baby Broccoli: Quality and supplies are good.

Brussels Sprouts: EXTREME Quality continues to be an issue. Growers are covering 10-week averages, but supplies are slowly starting to improve. Seeder and sizing still lean towards medium and smalls. Jumbos are very limited. Insect injury and elongated core are some of the main obstacles. The market has continued to rise and will stay escalated at the extreme level until supplies are back to normal.

Carrots (JUMBOS, MEDIUMS and CELLOS): The Desert growing regions are finishing for the season and will be transitioning to the Central San Joaquin Valley and southern Monterey County growing regions for the summer with good supplies and very good quality.

Cauliflower: Quality and supplies are good.

Celery: WATCHLIST Quality is good, but supplies are light with some growers. A major grower will transition to Salinas in June and that will also cause supplies to tighten up. The Organic Market is increased.

Corn, Sweet: Excellent supply out of Coachella and Brawley has started while volume remains steady out of Florida with Georgia on the horizon. Quality is good in all locations.

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

Kale: Supplies have improved, and quality is good.

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

Garlic: The 2024-2025 California Garlic season is coming to an end and as is sometimes the case during the transition from old crop to new crop garlic, there is a supply gap before the new California harvest begins. Starting the week of May 19th, we will see growers supplementing with product from Mexico to Bridge the Gap until new crop California Garlic gets started the first week of August. Quality will remain very good through this transition.

Ginger: Supplies and market are steady.

Green Cabbage: Supplies and quality look good.

Green Onions: WATCHLIST 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: 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: Supplies from Guatemala remain good and steady, with similar conditions expected to continue into next week. Peruvian product is anticipated to arrive by the end of the month. 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, 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: ESCALTED** Rain and light production has caused markets to increase and should adjust over the coming days as growers go back in and pick after the fields dry out. Quality will be mixed. Georgia and South Carolina will start next month and should stabilize the market
- **Snacking Tomatoes (Cherry, Grape and Medley): ESCALATED** Lighter supply available due to the rain, quality remains good.

Mexico

- **Round and Roma Tomatoes: ESCALATED** Lighter volume and higher demand from the east have pushed markets higher this week in general but large sizes were very short. We are transitioning to summer regions in Jalisco, Sonora, and Baja and should stabilize the markets over the coming weeks. Quality is outstanding on new crop; Quality is questionable on the remaining winter production.
- **Roma Tomatoes: Snacking Tomatoes (Cherry, Grape and Medley): ESCALATED** 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.

Georgia and South Carolina

- 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 Anjou's are down 7% or 47,000 boxes, so it is nothing dramatic like the others. The question on Red Anjou's 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: New crop Available out of California!

Tree Fruit: New crop Peaches and Apricots now available out of California. Peaches are now available in South Carolina and Georgia as well.

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

Quince: Limited supply available this week.