



## Weekly Market Review May 22, 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.

South Florida is quickly winding down for the season and will continue to see more items transition to South Georgia. 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 remain firm this week on Rounds and do not see 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 is 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. Avocado supplies have increased in anticipation of strong Memorial Day promotional activity. As the holiday passes, demand is expected to ease, and field prices have already softened in response. Mexico is nearing the end of its season, with slowing production as offshore arrivals ramp up. Late-season fruit continues to show high dry matter and a notable percentage of Grade 2s. Meanwhile, California is harvesting at strong levels, providing consistent quality fruit. Peru is steadily shipping to both coasts, supporting summer programs with robust demand across all sizes. Total U.S. avocado volume is expected to remain stable through June, similar to last week. Peruvian supply will double over the next two weeks, contributing to continued soft market pricing during this period. As programs shift from Mexico to Peru, spot market opportunities will vary, reflecting the transition in demand. In terms of size curve, Mexico's Loca crop will skew toward smaller fruit, while Peru will focus on 48ct and larger. Colombia is contributing 60ct and smaller fruit, and California maintains a balanced size curve, peaking on 48s with availability across all sizes. The upcoming transition to Mexico's Loca crop is a key period to monitor. While past seasons have seen delays, none are expected at this time—though the industry remains cautious, given the unpredictability that often surrounds avocado transitions. The weather is heating up in Salinas. They had a little heat wave at the beginning of the week. We are keeping a close eye on all the wet veg items to see if it has any lingering effects. We are also still keeping an eye on the insect pressure. It has been minimal so far, but it is still early in the season. Overall, supplies and quality are still looking good. Lettuce supplies and quality are starting to change a bit with some growers due to INSV. There has been some decrease in supplies. We may see the market firm up a bit. Broccoli and Cauliflower look very good right now and have great supplies, but Broccolini is getting a bit tight. The market has gone up and you will see some growers escalating pricing in the coming weeks due to the limited supplies. Spinach quality and supplies are just okay right now and is something we are keeping an eye on. Brussel Sprouts continue to be light in supplies. The market is still at the extreme level, but quality and supplies are improving. The market is trending down and will hopefully continue to do so. Jumbos are still limited, and sizing is leaning more towards small and medium. Bok Choy, Napa, Endive, Escarole, Fennel and Leeks. Leeks remain escalated, with supply shortages driving the market. Parsley has finally returned to regular pricing and looks good. Overall production in Salinas is still steady.









### 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**
- Tomatoes (Florida Only) – **ESCALATED**









### Watch List

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









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

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
65°   49°F	62°   52°F	60°   50°F	63°   52°F	66°   52°F	63°   52°F	64°   53°F	69°   54°F
							
Sunny	Partly Cloudy	AM Clouds/PM	Cloudy	AM Clouds/PM	Mostly Cloudy	AM Clouds/PM	Partly Cloudy









**OXNARD, CA**

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
69°   56°F	66°   54°F	65°   53°F	65°   54°F	66°   55°F	66°   54°F	66°   55°F	69°   57°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny









**COACHELLA, CA**

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
106°   71°F	104°   72°F	97°   69°F	101°   72°F	100°   70°F	97°   70°F	100°   73°F	103°   76°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









**HERMOSILLO, SONORA**

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
106°   71°F	103°   69°F	100°   68°F	101°   66°F	101°   67°F	100°   68°F	102°   71°F	102°   72°F
							
Sunny	Partly Cloudy	Mostly Sunny	Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny









**JALISCO, NAYARIT**

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
88°   61°F	89°   62°F	89°   63°F	90°   63°F	88°   62°F	89°   61°F	88°   63°F	88°   65°F
							
Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Partly Cloudy









**VIZCAINO, BAJA**

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
101°   65°F	100°   66°F	100°   67°F	100°   68°F	100°   67°F	100°   67°F	101°   68°F	100°   70°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny









**CULICAN, SINALOA**

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
101°   65°F	101°   67°F	102°   68°F	100°   68°F	100°   67°F	100°   67°F	100°   68°F	100°   70°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

**IMMOKALEE, FL**

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
93°   71°F	95°   71°F	95°   72°F	93°   73°F	93°   73°F	94°   74°F	94°   73°F	93°   73°F
							
Scattered	PM	PM	PM	PM	PM	PM	PM
Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms

#### LAKE PARK, GA

Thu 5/22	Fri 5/23	Sat 5/24	Sun 5/25	Mon 5/26	Tue 5/27	Wed 5/28	Thu 5/29
93°   65°F	95°   67°F	95°   70°F	95°   71°F	95°   72°F	93°   71°F	92°   70°F	88°   68°F
							
Sunny	Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	PM	PM
						Thunderstorms	Thunderstorms

#### 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 at 59.6M pounds last week, representing a 3% decrease from the previous week. Mexico's volume declined by 12%, while all other countries of origin (COOs) saw increases. Jalisco accounted for 6.4% of the Mexican volume shipped to the U.S. Weekly industry volumes are expected to remain steady through June, though COO market shares will continue to shift. Mexico is projected to fall below 50%, while both California and Peru are expected to reach 25% of total supply. In the field, fruit is predominantly small, with a high percentage of Grade 2s. The Main Crop is currently testing at 37% dry matter, with approximately five weeks remaining in the 2024–2025 season. The Off-Bloom Crop (Loca/Mendez) is expected to begin around the traditional July 1st start. California harvested approximately 15.4M pounds in week 20, with dry matter averaging 27%. Sizing is peaking on 48s and 60s, and strong demand leading into Memorial Day continues to support movement. Quality remains high, with consistently strong eating characteristics. The state is expected to maintain steady volume throughout the summer. The 2025 Peruvian season is now underway, with shipments reaching global markets, including consistent arrivals into the U.S. Sizing and quality have been strong, and the industry expects robust promotional activity throughout the season. Meanwhile, Colombia's Travesía Crop offers promotional opportunities on medium and small fruit, with dry matter levels improving steadily as the season progresses.

**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 and California mid to late June

#### Berries

**Strawberries:** Overall volumes continue to improve with continued favorable weather. In Santa Maria, temperatures climbed into the low 70s, with overnight lows in the mid-50s. The forecast remains stable, with no rain expected and highs continuing in the low 70s. While minor tip issues persist, overall quality remains strong. With warming conditions, production is expected to ramp up again over the next one to two weeks. Last week marked peak production for many blocks, and volumes should hold through this week before gradually tapering. Organic volumes are building steadily, with peak levels expected between next week and early June, supporting a strong supply position into late June. In the Watsonville/Salinas region, the weather has been cooler but dry, with highs in the mid-60s and overnight lows in the upper 40s. Conditions are projected to improve next week, with temperatures reaching the upper 60s to low 70s. The cool weather has preserved excellent fruit quality, although some bruising and dry calyxes have been observed in select varieties. Organic fruit remains slightly behind conventional in size but maintains a strong overall quality. Production estimates continue to increase, with a seasonal peak expected in June. All pack sizes are currently available, supported by strong volume, excellent sizing, and consistent quality.

**Blackberries:** In Mexico, weather conditions remain hot with significant temperature swings, ranging from highs in the 80s to 90s and lows in the 50s, as the region enters its hottest period ahead of the June rains. Blackberry quality remains strong, with medium to large sizing, good sheen, predominantly black color, and firm texture. However, elevated temperatures have contributed to some quality challenges, including red cell regression, attached calyx, and occasional soft or leaking fruit. Volume is steady, though currently in a production dip expected to persist through early May. Peak volumes are anticipated from late May through June. Organic blackberry production is expected to resume in early May with limited volume, gradually ramping up toward the end of the month. In Watsonville, conventional production started with minimal volumes.

**Raspberries:** In Mexico, current weather conditions are hot with wide temperature swings, with daytime highs reaching the 80s to 90s and overnight lows in the 50s as the region enters its hottest stretch ahead of the June rains. Fruit quality remains strong, characterized by good red color, solid firmness, and mostly medium sizing, with some occasional larger berries observed. While some overripe and crumbled fruit is appearing due to the heat, harvest crews are working diligently to exclude compromised fruit from packs. Raspberry volume is currently in a dip, but steady increases are expected throughout May, followed by a brief slowdown from late May through June, with volume anticipated to rebound in July and August. Organic raspberry production is expected to resume next week, with volume gradually building. In Watsonville, conventional raspberry production is projected to begin in July, while no organic volume is expected from this region for the season.

**Blueberries:** Weather remains hot with wide temperature swings, with highs in the 80s–90s and lows in the 50s, as the region enters its hottest period ahead of the June rains. Conventional volume is declining weekly, with the season expected to wind down by July. Organic production is anticipated to resume in August. Overall quality is good, with strong flavor, bloom, and appearance, though some heat-related issues are present, including redberries, soft or leaking fruit, and shriveling. Out of Oxnard, Temperatures rose slightly this week, with highs in the low 70s and lows in the 50s. Organic production has passed its peak and will decline steadily until the season ends in late May. Quality remains excellent, featuring strong size, bloom, and flavor. The region has seen hot weather, with highs in the upper 80s and lows in the 60s. Florida is currently at its production peak but will be declining shortly, though volumes remain 30–50% below forecast due to earlier hurricanes, storms, and heatwaves. Only conventional fruit is being harvested. Despite the reduced volume, quality has been excellent. Weather conditions have been warm, with highs in the 70s–80s and lows in the 50s. The region is currently producing conventional fruit, with peak production expected shortly. Like Florida, yields are down 30–50% from original estimates due to prior weather events. The season is expected to conclude quickly by early June, and open market volume remains limited. Hot and sunny weather continues, with highs in the 80s and lows in the upper 50s in the Central Valley. Warm temperatures are accelerating both organic and conventional production. Organic volumes are at peak levels, continuing through mid-June. Initial conventional harvests have begun, with excellent quality observed. Peak conventional volumes are expected toward the end of May, although open market availability remains limited. Production is expected to begin around July, providing a transition into summer volume.

### Citrus

**Oranges: WATCHLIST ON SMALL SIZES** Quality remains very good with good demand. Pricing on 88's and smaller 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 early 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 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 with the market continuing to strengthen on 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 and lack of rain in the growing areas have accelerated fruit maturation, leading to a prevalence of smaller-sized limes (200's, 230's and 250's). 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. Supplies on California Mandarins have lightened up significantly, market is very strong and will be finished by the end of May. California Grapefruit is available with light supplies on Fancy grade; choice grade is available.

### West Coast Lettuce

**Iceberg: WATCHLIST** Lettuce supplies, and quality are good, but we are seeing INSV creeping into some fields. We expect to see the market firm up because of this.

**Iceberg VA:** Quality and supplies look good but could be affected by INSV if it persists in the fields.

**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. The market is starting to trend a bit higher.

**Romaine VA:** Quality and supplies are good but could be an issue if INSV persists in the fields.

**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 10<sup>th</sup> 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 next week.

**Slicer Cucumbers:** Lighter supply crossing through Nogales and McAllen. Baja will ramp up volume this week while Florida will finish this week and we are completely transitioned to South Georgia. 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** Production has improved in Guatemala thanks to favorable weather and much-needed rainfall. However, vessel delays continue to impact logistics. In contrast, there is a good supply of French beans out of Mexico, with steady movement.

**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** Out of the East, basil quality continues to be impacted by persistent rain in Colombia. Imported chervil volumes are limited due to adverse weather conditions in Ecuador. Meanwhile, out of the West, basil supply and quality are steadily improving. Supply on all other herbs remains stable.

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 a complete transition from our offshore program to the desert by the end of the month. We will start some regional distribution out of the desert this week. 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 9's and 12's and 15's will be limited.

**Honeydew: WATCHLIST** Honeydew production is extremely short due to a GAP in Mexican Production. Being flexible on sizing is necessary for the next week to 10 days. Brix levels are mostly in the 12-14% range, shell quality is mixed.

**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** Baja continues with low volume due to weather. Peru continues to increase volume, but mostly with smaller sizing. Michigan has started with good production. Cooler nights are expected next week which may slow down production. Markets are less active with more Peruvian grass in the market and domestic regions starting up as well.

**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: WATCHLIST** Quality is good, but supplies are getting light. You will likely see some growers escalate pricing due to the increased market and limited supplies in the coming weeks.

**Brussels Sprouts: EXTREME** Quality and supplies are improving. 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 19<sup>th</sup>, 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: 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 supplies are limited, while sugar snap volumes remain stable. However, quality concerns may arise due to elevated humidity in the growing region. In Mexico, production of both snow peas and sugar snaps remains steady.

#### **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 Tomatoes:** Plenty of new crop production available out of Jalisco, Baja and parts of Central Mexico. Demand from the east was keeping upward pressure on the FOB market but that has settled this week for the holiday weekend. Quality is outstanding on new crop while there are still some lingering quality issues with residual winter production.
- **Roma Tomatoes: 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.

### **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.

Anjou's 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 Anjou's packed. When we start to pack Anjou's— this will be your value pear. Anjou's 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.