



Weekly Market Review June 19, 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 going to be fighting some weather here in the southeast but don't see any major delays on the horizon. We are also watching a hurricane on the west coast of Mexico that will make landfall today in Guerrero and Oaxaca; this storm is expected to bring heavy rain and local flooding to the region over the next few days and may impact harvest schedules and freight coming from Southern Mexico to the US Border. Currently Nogales and McAllen are seeing steady volume on Tomatoes; most other veg will slowly scale back for the summer and move to regional locations. Jalisco and Baja Monterey will take on most of the Mexican volume on Tomatoes. Stronger demand on Romas will call for premiums across that category and quality is very good out of Mexico. Georgia, North and South Carolina quality is good but will begin to wind down and transition to North Carolina/Tennessee will start next week. California production on Tomato and veg is strong; good production on Bells out of Coachella this week despite record heat. Slicer Cucumber is good out of Georgia and Baja. Items that remain light in supply are Tomatillo and Habanero. Jalapenos were tight this week. The offshore Table Grape season is done; volume will improve out of Mexico this week and should see some additional domestic volume out of the desert as well. Arvin is about 2 weeks out. Melons are now in full swing out of the desert; quality is very good. 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/ Nectarines, Red/ Black Plums and Apricots, there are also Peaches available in the east out of Georgia and South Carolina. Cherries out of Washington State. Over the next four weeks, availability of larger sizes from Mexico is expected to improve, creating promotional opportunities for sizes 48ct and larger. Smaller sizes will remain tight until the Flor Loca crop begins. Supply remains steady overall, with demand building ahead of 4th of July promotions. The market is strong across all sizes for both Mexican and California fruit. Mexico is nearing the end of its season, showing high dry matter and a significant percentage of Grade 2 fruit. The transition to the Flor Loca crop is expected in early to mid-July—a period typically marked by supply and price volatility. California production remains steady, with field prices rising as demand increases. Peru continues to make a meaningful contribution to the overall U.S. supply. Salinas has been experiencing some weather fluctuations, and it is keeping the industry on its toes. There has been another warming trend this week but look as if the temperature will get back to normal as we get closer to the weekend. We will continue to keep a close eye on the temperature and send out any necessary updates but at the moment, the weather looks as if it will get back to good growing region weather. With those normal temps we will see the insects getting active. Insect pressure 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 steady, but we are seeing some lighter weights and lower yields. We could see the market firm up soon with demand increasing. There have been some reports of INSV, but they have been minimal. The Romaine and Romaine Hearts market has been on the rise and Hearts are now escalated. Demand has increased and seems to be driving the market. Broccoli still has good quality and supplies, but Cauliflower is getting light with some growers. Most of the growers still seem to have good supply, but there are a few that are struggling a bit. Brussels Sprouts are no longer escalated but supplies are getting tight again. Some growers are losing yields due to quality. This is a tough time of year as Mexico is very hot, and some growers are winding down in Oxnard, so supplies are light. Salinas will start up in a few weeks for some growers so supplies will improve at that time. Until then, supplies will get light, and we will have growers holding to averages. Bok Choy, Napa, Endive, Escarole, Fennel and Leeks remain escalated, but supplies are improving, and the market is trending down. Overall production in Salinas is still steady.









Alert List

- Avocados – **ESCALATED**
- Bananas – **ESCALATED**
- Bok Choy – **ESCALATED**
- Celery Organic – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Garlic – **ESCALATED**
- Hot Peppers (Jalapeno, Tomatillo and Shishito) – **ESCALATED**
- Leeks – **ESCALATED**
- Limes – **ESCALATED ON LARGE SIZES**
- Napa – **ESCALATED**
- Table Grapes – **ESCALATED**
- Romaine Hearts – **ESCALATED**









Watch List

1. Asparagus
2. Blueberries
3. Broccoli
4. Broccolini
5. Brussels Sprouts
6. Cauliflower
7. Celery
8. Cilantro
9. French Beans
10. Herbs
11. Lettuce Iceberg/VA
12. Lemons – **SMALL SIZES**
13. Oranges – **SMALL SIZE NAVELS**
14. Pineapple
15. Romaine
16. Ginger
17. Green Onions
18. Snow Peas & Sugar Snap Peas
19. Spinach









Weather
SALINAS, CA

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
62° 53°F	64° 50°F	68° 50°F	67° 52°F	67° 52°F	65° 52°F	67° 54°F	70° 54°F
							
Partly Cloudy	AM Clouds/PM	Sunny	Sunny	Partly Cloudy	AM Clouds/PM	AM Clouds/PM	Partly Cloudy









OXNARD, CA

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
67° 57°F	68° 57°F	69° 56°F	69° 58°F	67° 56°F	67° 58°F	68° 59°F	70° 59°F
							
AM Clouds/PM	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny









COACHELLA, CA

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
112° 77°F	110° 74°F	102° 67°F	101° 70°F	100° 70°F	102° 73°F	105° 77°F	108° 78°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









BAKERSFIELD, CA

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
103° 66°F	89° 60°F	82° 59°F	88° 63°F	92° 66°F	95° 68°F	98° 71°F	101° 74°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









HERMOSILLO, SONORA

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
113° 82°F	108° 83°F	102° 79°F	101° 78°F	102° 79°F	103° 81°F	103° 81°F	104° 82°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny









JALISCO, NAYARIT

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
85° 67°F	75° 65°F	74° 65°F	77° 65°F	79° 65°F	77° 65°F	80° 64°F	82° 65°F
							
PM	Thunderstorms	Rain	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms









VIZCAINO, BAJA

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
104° 62°F	99° 61°F	94° 59°F	93° 60°F	94° 63°F	95° 64°F	97° 67°F	100° 68°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny

LAKE PARK, GA

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
91° 73°F	94° 72°F	94° 74°F	94° 73°F	95° 73°F	95° 73°F	96° 73°F	94° 73°F
							
PM Thunderstorms	Partly Cloudy	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	PM Thunderstorms

HENDERSONVILLE, NC

Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26
82° 63°F	85° 64°F	87° 66°F	90° 68°F	92° 69°F	93° 68°F	93° 68°F	91° 66°F
							
PM Thunderstorms	Partly Cloudy	Mostly Sunny	Mostly Sunny	Sunny	Mostly Sunny	Mostly Sunny	PM 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 Last week, the U.S. avocado industry closed at 64.5M pounds. Markets across all sizes remain steady. The increase is attributed to Mexico's increase in volume by 19%, while the other COOs all reported a weekly decline in volume. The field is currently producing mostly small-sized and Grade 2 fruit. With the rainy season now underway, harvest volumes may be impacted in the coming weeks. The Main Crop has a current dry matter reading of 37%. Approximately two weeks remain in the 2024–2025 crop. APEAM has revised its crop estimate downward by 28,558 metric tons (approximately 63M pounds), lowering projected average weekly shipments to the U.S. from 50M to 27M pounds. The new Off-Bloom Crop (Loca/Mendez) is expected to begin around the traditional July 1st start. APEAM has forecasted a 7.8% year-over-year increase for Jalisco's 2025–2026 Mendez crop and a 19.6% increase for Michoacán's Loca crop. The 2025 Peruvian avocado season is approximately halfway through, with over 300,000 metric tons shipped globally to date. U.S. programs are currently active and expected to continue through the summer, with promotional volumes available on larger fruit. Shippers in northern Peru are expected to wrap up in the coming weeks, as volume transitions to southern exporters. ProHass projects total avocado volume for the 2025 season to reach 658,210 metric tons. Approximately 10.7M pounds were harvested in Week 24, with dry matter averaging 28% from California. Sizing is currently peaking on the 60s, followed by 48s. The California Avocado Commission has revised its crop forecast downward to 340M pounds, a decrease from the preseason estimate of 375M pounds. Fruit is expected to remain available through the summer, with volumes gradually tapering off in July. Eating quality continues to be excellent. Volume from the Traviesa crop is readily available, with promotional opportunities on medium and small sizes. Dry matter is steadily increasing as the season progresses. As Peru continues to supply larger sizes, the industry anticipates a potential window of opportunity for increased movement of medium and small fruit during the summer months. Currently, the majority of Colombian exports are directed to the European market.

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 for some time due to low production in Central America. We are suggesting flexibility in sizes to ensure stability of the supply chain. Overall quality and taste are good.

Table Grapes: ESCALATED The table grape market remains strong on greens due to recent severe weather—including heavy winds, rain, and early heat in both Caborca and Hermosillo. We continue to see quality concerns, particularly with all green varieties, and estimate crop losses could exceed 2 million boxes. Given the current outlook, we continue to recommend subbing red varieties where possible over the next two weeks. Red markets have eased back some and there is significantly more volume on reds than green. Steady volume will continue out of Coachella and Arvin is expected to scratch the week of June 23. Looking ahead, as we transition into California's season, we anticipate more stable volume barring any unexpected disruptions to the crop.

Berries

Strawberries: Supply and availability are expected to remain steady over the next few weeks. Quality is strong, the flavor is sweet, the color is full red, and the sizing is medium to large. This week in the valley, daytime highs averaged in the mid-60s, with morning lows in the low 50s. A persistent marine layer has kept mornings overcast before clearing to partly sunny afternoons with occasional breezes. These conditions have supported consistent production and overall quality. Conventional fields are producing clean, well-sized fruit. While some culling continues—mainly for softness and undersized berries—blocks transitioning to freezer production are reporting excellent yields and quality. Organic acreage remains 100% fresh, with similar size profiles. Occasional bruising or softness deeper in the pack is being managed by crews actively removing compromised fruit. Harvest scheduling continues to adjust to avoid overripe fruit, with second passes this week expected to improve consistency. Despite moving past peak, many blocks still show healthy flower and green fruit sets, with vigorous plant activity supporting continued fresh harvest through mid-June. Approximately 65–70% of conventional acreage has transitioned to cannery use, while the remaining acreage will stay fresh until the end of the month. Organic fields are on track to complete planting by early July. In Watsonville and Salinas, similar weather patterns—mid-60s daytime highs and low-50s nighttime lows—have supported strong fruit firmness and color development. While some bruising has been noted due to fast-paced harvesting, field teams are working to address this through improved management practices. These regions are currently in peak production, although not all varieties are aligned in their cycles; some have already peaked and are beginning to decline, while others are still ramping up.

Blackberries: Production is currently active across Central Mexico, Oxnard, Georgia, California, and Baja. Mexican production is steadily declining, while Georgia is at its peak. Oxnard remains consistent with stable output. Overall quality across all regions is strong, with fruit showing good size, color, firmness, and sheen. In Central Mexico, daytime temperatures range from the mid-80s to the low 90s. Scattered rain and isolated thunderstorms are forecasted, although conditions remain highly localized—some areas experience intermittent showers, while others remain dry. Humidity levels are rising, and while temperatures remain elevated, they are expected to stay below the low 90s. Fruit quality is generally good, characterized by medium to large size, firm texture, and predominantly black coloring. However, high heat has contributed to some issues, including red cell regression, attached calyx, and occasional soft or leaking fruit. Out of Georgia, blackberry volume is steady, with peak production expected to continue for a few more weeks before tapering off.

toward the end of June. Rain forecasted for next week may slightly impact output, but overall volume is expected to remain consistent through the rest of the year. A dip in July production is anticipated, which will be supplemented by increasing volume from Watsonville. The organic volume from Mexico is beginning to wind down and is expected to remain limited through July as the season concludes. In Watsonville, the weather has been mild and cool, with highs in the 60s and lows in the mid-40s to the mid-50s. Warmer conditions have helped conventional production begin to pick up. Quality has been excellent, with large, juicy fruit. Although current output is limited to a few pallets per couple of days, volume is expected to increase significantly starting in June, with strong availability anticipated through September. Organic production has also begun with initial scratch pickings and will remain limited for the next few weeks as it ramps up.

Raspberries: Watsonville raspberry crops are coming on strong and are expected to continue increasing over the next few weeks. The variety is performing well, with sweet, aromatic flavor, full red color, and good sizing. The weather in the region has been cool and mild, with highs in the 60s and lows in the mid-40s to the mid-50s. Conventional volume remains light for now but is expected to ramp up toward the end of June. Despite the lighter volume, quality has started off strong with clean, well-sized red berries. No organic volume is expected from this region for the season. In Central Mexico, daytime temperatures range from the mid-80s to the low 90s, with scattered rain and isolated thunderstorms forecasted. While some areas remain dry, others have seen intermittent showers. Humidity is increasing, but temperatures are expected to stay below the low 90s. Fruit quality is holding up well, with a strong red color, good firmness, and mostly medium-sized berries, with occasional larger ones. Some issues, such as overripe, uneven ripening, and crumbled fruit, are being observed due to the heat, but crews are actively managing pack quality. Volume has been steady, with a peak expected in late June. So far, rain has not caused significant damage, and recent cooler weather has helped improve overall fruit condition. Organic volume from this region continues to arrive in limited but consistent amounts.

Blueberries: WATCHLIST Central Mexico is also still active, though winding down. Daytime temperatures range from the mid-80s to the low 90s, with scattered rain and isolated thunderstorms forecasted across the region. These patterns are highly localized; some areas remain dry, while others experience intermittent showers. Humidity is rising, and temperatures are expected to stay elevated but stable. Conventional volume is trending downward on a weekly basis, with the season projected to conclude by early July. Organic production is expected to resume in August. Quality remains good overall, with strong bloom, flavor, and appearance; however, some redberries have been noted to be soft or leaking, and heat-related shriveling has been observed. In California's Central Valley, the weather has been hot, with highs in the 80s to 90s and overnight lows in the upper 50s to 60s. This warm trend is expected to continue into next week. Both conventional and organic production are at peak levels, although organic fields may be nearing a post-peak level. Fruit quality has been excellent, with strong bloom, good sizing, and great flavor. Production is expected to continue through the beginning of July, with good availability for both conventional and organic blueberries. In Georgia, production continues, and quality has remained consistent, but production is winding down. New Jersey is expected to begin harvest shortly, though recent rain has caused some delays. In the Pacific Northwest, Oregon's season is roughly six days away. A few days of triple-digit temperatures early in the crop have prompted close monitoring of fruit quality as harvest begins.

Citrus

Oranges: WATCHLIST ON SMALL SIZE NAVELS Navel quality remains strong with solid demand as the season nears its end. Small sizes continue to be in short supply and are expected to remain limited throughout the season. Pricing on 88s and smaller is firming as the size profile shifts toward larger fruit. The Navel crop is expected to finish in late June or early July, and ample lead time is recommended for orders—particularly for small sizes—as many shippers are now holding to averages. Valencia season is underway and off to a strong start. The fruit's appearance is excellent, and the juice content is high. Sizing is peaking on 72s, 88s, and 113s. However, early estimates indicate a lighter overall crop volume this year. Initial harvests are yielding smaller fruit, with sizing expected to increase as the season progresses through the summer.

Lemons: WATCHLIST ON SMALL SIZES. With rising temperatures, demand for fresh lemons is increasing. Harvest and packing are in full swing in District 2, and both size and grade curves are tracking as expected for the region. The current size structure is trending toward 140s, 115s, 165s, and 96s. Promotable volumes are available on Choice grade fruit, particularly in 140s and larger. However, smaller sizes—165s and 200s—remain limited. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

Limes: ESCALATED ON LARGE SIZES We are starting to see supplies improve slightly on large sizes (110's, 150's and 175's) with good supplies on smaller-sized limes (200's, 230's and 250's). The market is steady on large sizes, but we are seeing lower on small sizes. Quality is improving.

Imports/Specialties: Blood Oranges will be finishing for the season in the next few weeks. Sizing is running small. Grapefruit is available with light supplies on Fancy grade; choice grade is available. Cara's, Minneolas and Mandarins are all but finished for the season.

West Coast Lettuce

Iceberg: WATCHLIST Lettuce supplies and quality look good but we are seeing lighter weights and increased demand. There have been some reports of INSV, but they have been minimal. The market is expected to rise.

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

Romaine: WATCHLIST & Romaine Hearts: ESCALATED 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. The market is trending higher, and Romaine Hearts are still escalated.

Romaine VA: Quality and supplies are good, but we are keeping an eye on insect pressure and the weather.

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

Eastern and Western Vegetables:

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Green Bell Pepper: Good supply available in McAllen, South Georgia and Coachella. Quality is good in all markets.

Color Bell Pepper: Good supply available in McAllen as well as crossing from Baja and Coachella while Canada remains steady on 11# all sizes. South Georgia should ramp up production on reds over the next week. Quality is good at all shipping points.

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

Mixed Chili Pepper: **WATCHLIST** Supplies in general are good across most varieties out of Mexico, but quality is mixed. We should scratch new fields in Baja this week which will improve supply and quality. Jalapeño and Tomatillo were lighter this week. Shishito will be the shortest and could see some supply interruptions. Fresno started picking some Poblano and Jalapeno this week and South Georgia should start over the next 7 to 10 days.

Eggplant: Domestic supply is steady out of the desert, and quality is outstanding. South Georgia will start this week.

Slicer Cucumbers: Stable supply crossing through Otay and McAllen. Domestic supply out of Georgia is steady and the quality is outstanding at all points.

English Cucumbers: Good supply available this week. Quality is good.

Pickles: Stable supply expected over the coming weeks out of South Georgia.

Green Beans: Good Supply available with new crop beans coming available out of Georgia and Baja. We are seeing some rain in the region and could impact supply over the next week. Coachella should ramp up over the next week. Quality is good.

French Beans: **WATCHLIST** Production out of Guatemala has slowed due to a lack of rainfall and continued shipping delays. However, a fair supply of conventional French beans is currently available from Mexico, helping to support overall availability.

Zucchini/Yellow Squash: Good volume available in South Georgia. In the west we now in Full production out of Fresno and Baja with some lingering production out of Sonora. Quality is good.

Herbs: **WATCHLIST** Basil quality continues to be affected by rain in Colombia, while imported chervil remains extremely limited due to adverse weather in Ecuador. On the West Coast, the supply and quality of basil are strong. Supply on all other herbs is steady, with chervil being the notable exception due to ongoing weather-related 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: Excellent supply and quality out of the desert on cantaloupe and honeydew. Watermelons are also in good supply.

Cantaloupe: Yuma is now in full swing and sizing will improve as we start to see a more typical pattern of 9s followed by 12s. Field reports show excellent quality from the desert. Fruit quality is outstanding, seeing good shell and internal color in the fields; brix levels mostly in the 14-16% range consistently. Good supply on Athenas out of South Georgia.

Honeydew: Honeydew production has started off strong and is coming in with an excellent mix of 5s and 6s. The domestic dews are mostly clean with occasional scarring showing which is common in the desert due to higher winds in the region throughout the growing cycle. Brix levels on the dews are mostly in the 14-16% range.

Watermelon: Watermelon volume is very good out of Mexico, Georgia, South Carolina and Florida; growers are making dealing on all sizes. Quality is outstanding.

Mixed Vegetables

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Artichokes: Quality and Supply are good.

Asparagus: WATCHLIST Baja production continues to increase. Peruvian volume remains unchanged. Michigan continues with cooler weather which has affected production and sizing. Next week is expected to be their last week of production. Markets and demand are firming up with domestic production wrapping up because of seasonality.

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 with the majority of the suppliers.

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

Brussels Sprouts: WATCHLIST Supplies are getting tight again. Things should improve as we get into Mid July but until then, you can expect to see growers holding to averages and we may see pricing escalated again.

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: WATCHLIST Quality is good, but supplies are light with some growers.

Celery: WATCHLIST Quality is good, but supplies are light with some growers. Sizing has shifted towards 30/36ct. Some growers will transition to Salinas in June and that will also cause supplies to tighten up. The Organic Market is still increased.

Corn, Sweet: Excellent supply out of Georgia and Florida. In the west, the desert and Brawley are done and have transitioned to Tracy and Brentwood. We are seeing a split market with higher prices in the west. 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: ESCALATED The 2024-2025 California Garlic season is ending 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. Growers are currently supplementing with product from Mexico to Bridge the Gap until new crop California Garlic gets started the first week of August. Quality remains good although available supplies will be decreasing, "PRICING WILL BE ESCALATED"!

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 and supplies are good.

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

Snow Peas and Sugar Snaps: Production out of Guatemala is currently down due to a lack of rainfall in the growing regions. Additionally, high humidity is contributing to quality concerns. Peruvian products are available as an alternative, although market pricing remains elevated. Mexican production has concluded for the season, and domestic supply will be limited over the next two weeks.

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:

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.

East Coast

Round and Roma Tomatoes: The season will be winding down out of Georgia and South Carolina this week and start the transition to Tennessee and North Carolina. We may see some volatility over the coming weeks but barring any major weather events due to these transitions. Current quality will be mixed due to weather.

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 is lighter this week on rounds despite seeing excellent quality. We are keeping an eye on Hurricane Erick as it makes landfall in Western Mexico today. It may impact harvesting and transportation lanes this week, bringing localized flooding to the Oaxaca, Guerrero and Parts of Jalisco.
- **Roma Tomatoes:** Steady supply and higher demand have put upward pressure on FOB pricing; quality remains good. We are keeping an eye on Hurricane Erick as it makes landfall in Western Mexico today. It may impact harvesting and transportation lanes this week, bringing localized flooding to the Oaxaca, Guerrero and Parts of Jalisco.
- **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

- Volume ramping up out of the valley and should continue to improve over the coming weeks. Quality is good.

Other Fruit:

Apples: **Red Delicious** apples have good availability across all sizes and grades, with a steady market expected to carry through until the new crop begins around the second week of September. **Golden Delicious** supplies remain available in most sizes and grades, though some growers are nearing the end of their season. Availability should continue for another month or two, though tightening supply may lead to firmer pricing. **Gala** apples show strong availability across all sizes and grades, with the market holding steady and supply projected to last until new crop harvest in mid-August. **Fuji** remains well supplied in larger sizes and higher grades, with steady markets expected through September. **Pink Lady** apples are solid in both supply and quality, though a brief gap may occur prior to the new crop harvest in October. **Honeycrisp** is experiencing tight supply across all sizes and grades; most USXF/WAXF #2 fruit has finished for the season. The market continues to strengthen, and a short gap is anticipated before new crop availability resumes in August. **Granny Smith** apples are in good supply across all sizes and grades, with steady markets expected to continue until the early September harvest. On the organic side, Gala, Fuji, Pink Lady, and Granny Smith apples are available in very limited volumes across most sizes and grades, while Honeycrisp is mostly finished until the new crop returns in August.

Pears: **D'Anjou** availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. **Red D'Anjou** pears are moderately available in US #1 35–55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Limited availability.

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

Cherries: Season is done and has transitioned to Washington.

Stone Fruit: New crop Peaches, Nectarines, Plums 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.