

Weekly Market Review

March 14, 2025

Overview

President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, will not take effect until April 2nd. With that, we will continue to see strong production out of South Florida on several items, with good quality and availability across multiple commodities. Mixed Hot Peppers, particularly Caribes, were the lightest in supply. Similar availability and quality are observed through Nogales and McAllen. Markets are firmer today on Tomatoes, Yellow Squash and Green Bells with Pickles being one of the tightest this week. We will see this continue as transition in the west from Sinaloa to Sonora ramps up on several spring items. The Offshore Table Grape season has improved, with stable supply. Melons have also turned the corner, showing excellent volume and quality out of the ports as well as crossing through Nogales. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible in pineapple sizes. Industry supply remains limited, and the market is tightening as supply stabilizes. The Avocado industry continues to experience tight supply and elevated pricing following last week's market disruption. This week, growers are focused on rebuilding inventories, with a short window to further replenish stocks before Holy Week in week 16. In Mexico, a significant portion of smaller fruit is being retained for domestic consumption ahead of Lent and Easter, while larger fruit remains scarce and commands a premium. The U.S. market will continue to compete with Mexico for available supply as domestic demand in Mexico rises throughout Lent, which extends until April 20. Additionally, the industry continues to see a high percentage of Grade 2 fruit coming out of Mexico, a trend that is expected to persist. Supply from California remains limited due to rainfall, further tightening availability. Given these factors, total industry supply is anticipated to remain limited, with high prices expected to continue in the foreseeable future. Transition is once again right around the corner. We will see growers transition to Oxnard, Huron and of course Salinas. The weather has been a constant challenge in Yuma, but it does look like a warming trend is on the horizon and hopefully set to stay this time. Overall supplies are looking good, but with transition on the horizon, we will see the normal issues with supplies and quality as we get closer to the actual transition dates. We also know that bugs will be a potential issue, especially on Cilantro and Kale, so we will keep a close eye on that. Broccolini is still on the alert list since some growers have increased the price due to very limited supplies. Endive, Escarole, Cilantro, and Spinach remain escalated, with supply shortages driving market conditions. Bok Choy, Fennel and Leeks remain at the extreme trigger level. Red Cabbage is still slightly escalated and looks like it will remain that way through transition. The cool weather in the mornings could still cause epidermal peel and frost damage, while the warm weather in the afternoons will likely attract insects. Insects will be something that the fields will battle throughout March. Aphids are likely to target Arugula, Kale and Cilantro so we will be monitoring those items closely. We will keep an eye on those items and all leafy greens and keep everyone updated on any issues. We are adding Lettuce and Broccoli to the watchlist as they are usually items that experience issue during transition. Growers will, as always, do their best to prevent any supply gaps and will try to get everyone the best quality but some issues should be expected.









Alert List

- Avocados – **ESCALATED**
- Bok Choy – **EXTREME**
- Broccolini – **ESCALATED**
- Cabbage, Red – **ESCALATED**
- Celery Organic – **ESCALATED**
- Cilantro – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **EXTREME**
- Herbs – **ESCALATED**
- Hot Peppers (Caribe) – **ESCALATED**
- Leeks – **EXTREME**
- Limes – **Escalated on some sizes**
- Napa – **ESCALATED**
- Parsley (Italian & Curly) – **ESCALATED**
- Spinach – **ESCALATED**









Watch List

1. Banana and Pineapple
2. Arugula
3. Asparagus
4. Broccoli
5. Cabbage, Green
6. Cauliflower
7. French Beans
8. Lettuce, Iceberg
9. Lettuce, Romaine
10. Pickles
11. Ginger
12. Snow Peas & Sugar Snap Peas
13. Squash, Yellow
14. Eggplant









Weather
OXNARD, CA

Thu 3/13	Fri 3/14	Sat 3/15	Sun 3/16	Mon 3/17	Tue 3/18	Wed 3/19	Thu 3/20
56° 44°F	52° 43°F	62° 45°F	63° 49°F	61° 47°F	62° 46°F	65° 46°F	65° 48°F
							
AM Showers/Wind	Rain	Partly Cloudy	Mostly Cloudy	AM Clouds/PM Sun	Sunny	Mostly Sunny	Mostly Sunny









YUMA, AZ

Thu 3/13	Fri 3/14	Sat 3/15	Sun 3/16	Mon 3/17	Tue 3/18	Wed 3/19	Thu 3/20
65° 48°F	64° 50°F	73° 49°F	79° 55°F	84° 57°F	73° 52°F	76° 50°F	81° 54°F
							
Showers/Wind	AM Clouds/PM Sun	Sunny	Partly Cloudy	AM Clouds/PM Sun	Sunny	Sunny	Sunny









HERMOSILLO, SONORA

Thu 3/13	Fri 3/14	Sat 3/15	Sun 3/16	Mon 3/17	Tue 3/18	Wed 3/19	Thu 3/20
77° 50°F	71° 48°F	78° 52°F	93° 57°F	93° 57°F	84° 54°F	87° 56°F	93° 55°F
							
AM Clouds/PM Sun	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Sunny









JALISCO, NAYARIT

Thu 3/13	Fri 3/14	Sat 3/15	Sun 3/16	Mon 3/17	Tue 3/18	Wed 3/19	Thu 3/20
84° 54°F	82° 47°F	77° 49°F	82° 54°F	82° 55°F	84° 54°F	85° 54°F	87° 55°F
							
Sunny	Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny









VIZCAINO, BAJA

Thu 3/13	Fri 3/14	Sat 3/15	Sun 3/16	Mon 3/17	Tue 3/18	Wed 3/19	Thu 3/20
75° 45°F	69° 49°F	76° 48°F	85° 56°F	87° 51°F	78° 53°F	79° 55°F	88° 53°F
							
AM Clouds/PM Sun/Wind	Sunny/Wind	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy/Wind	Sunny

CULICAN, SINALOA

Thu 3/13	Fri 3/14	Sat 3/15	Sun 3/16	Mon 3/17	Tue 3/18	Wed 3/19	Thu 3/20
93° 52°F	86° 50°F	86° 50°F	92° 54°F	92° 54°F	92° 54°F	93° 53°F	95° 54°F
							
Sunny	Mostly Sunny	Sunny	Mostly Sunny	Partly Cloudy	Sunny	Mostly Sunny	Partly Cloudy

IMMOKALEE, FL

Thu 3/13	Fri 3/14	Sat 3/15	Sun 3/16	Mon 3/17	Tue 3/18	Wed 3/19	Thu 3/20
84° 55°F	86° 62°F	89° 69°F	90° 65°F	79° 51°F	81° 51°F	85° 53°F	86° 54°F
							
Mostly Sunny	Sunny	Mostly Sunny	Mostly Sunny	AM Thunderstorms	Sunny	Sunny	Sunny

Fruits & Vegetables

Tariff Update: *President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, will not take effect until April 2nd.*

Avocados: ESCALATED Industry supply remains tight, and pricing continues to rise following last week's market disruption caused by tariff-related uncertainty. The tariffs led to a sharp decline in fruit passing inspections, closing at just 43.7M pounds for the week—well below the industry's 60M pound expectation—resulting in ongoing market volatility. Smaller-sized fruit, which is in the highest demand, remains in limited supply. In Mexico, a significant portion of smaller fruit is being retained for domestic markets ahead of Lent and Easter, while larger fruit remains at a premium due to reduced availability. Additionally, supply out of California remains constrained due to recent heavy rainfall. Total industry supply is expected to stay limited, with elevated prices persisting in the near term. The Main Crop currently has a dry matter estimate of 32.7%. Meanwhile, the USDA continues to enforce restricted packhouse production hours industry-wide, further straining capacity. In California, approximately 3.3M pounds were harvested in Week 10, with dry matter averaging 24%. Early-season fruit sizing has been a challenge, and another major storm in California this week has further impacted harvesting efforts.

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

Pineapples: WATCHLIST Pineapples will remain tight and are not expected to improve until the end of February, with peak volume hitting in May. Flexibility in sizes will be necessary over the next several weeks.

Table Grapes: Stable supply is available on whites, reds, globes and black varieties, and we hit a stable production cycle on grapes from Peru and Chile. Quality is good.

Berries

Strawberries: Overall, supplies remain relatively steady but are tightening. To maintain consistent supply levels in the coming weeks, it will be crucial for rainfall in California to subside soon. Strawberry availability in the West remains highly limited due to persistent rainfall, which has hindered harvesting efforts and prevented crews from accessing fields to strip fruit. Supplies have slightly declined in Mexico due to seasonal trends, while Florida production remains steady. As weather conditions stabilize in California, production is expected to improve steadily, with above-normal volumes projected for March. However, limited fruit availability from the West is likely to persist through at least next week. In Mexico, high temperatures and fluctuating conditions continue to cause uneven ripening, and overall production is declining as the season nears its end. Many smaller growers have already ceased operations, and fruit sizes are trending smaller. Quality concerns, including bruising and soft skin, remain a focus for shipments from Mexico. Florida has experienced fluctuating temperatures with light rain, though no significant damage has been reported. While cooler weather may slow production in the short term, it could contribute to improved fruit quality over time. Across all regions, growers remain proactive in managing quality concerns and adjusting harvesting strategies to optimize supply and maintain fruit integrity.

Blackberries: Blackberry quality remains strong, with medium to large sizing, good sheen, and firm fruit. However, some challenges persist, including red cell regression, attached calyx, and occasional soft or leaking berries. Volume is holding steady at peak levels through July, though a slight decline is expected toward the end of February. Organic production is tapering off earlier than anticipated as the season nears its conclusion.

Raspberries: Raspberry quality remains strong, with vibrant red color, good firmness, and mostly medium-sized fruit, with some larger berries mixed in. While some overripe and crumbled fruit is present, crews are diligently working to exclude them from packs. Volume is expected to remain at a consistent peak through April, with a slight decline anticipated toward the end of February. Organic

production is performing well, with steady availability expected as we move into peak production, ensuring decent supply through March.

Blueberries: In Mexico, warm temperatures persist, with conventional production at its peak, expected to last through mid-April before steadily declining into May. Organic production has concluded for the season, with a supply gap anticipated until August. Quality remains excellent, though some redberries, soft fruit, and shriveling are being observed. Chile is wrapping up its season earlier than expected due to high heat and rain events, though arriving fruit has shown excellent quality, size, and color. Conventional shipments will continue through March, with limited open-market availability due to reduced Chilean estimates. Organic shipments will also remain consistent through March. Oxnard is seeing favorable weather, and organic blueberry production is ramping up with excellent size, flavor, and bloom. Volume is increasing quickly, with peak production expected in late March. Florida is set to begin conventional blueberry production this week, though recent cool and wet weather on the Mid-East Coast has slightly reduced early-season estimates. Despite this, the region is expected to start strong, with good quality and solid Jumbo berry volume.

Citrus

Oranges: Quality from California remains excellent with very good supplies. Pricing on smaller sizes, 113's and 138's, continues to strengthen up as the size structure is switching, but the overall market is stable. Rain in the growing areas this week has slowed production in some areas with more rain expected later this week.

Lemons: Good supplies and very good quality out of all growing areas in California. Ideal time for promotions.

Limes: ESCALATED ON SOME SIZES The Tariff situation disrupted the market this past week, as growers in Mexico slowed down operations due to the uncertainty of financial implications with Tariffs being applied to Mexican imports. In addition, overall yields have declined. Small sizing is peaking, including 200's, 230's, and 250's with large fruit limited in availability. Quality and condition is better, and the fruit represents less defects, especially oil spots, which has been the primary issue previously.

Imports/Specialties: California Mandarins, Grapefruit, Cara-Cara, and Blood Oranges are seeing very good quality.

West Coast Lettuce

Iceberg: WATCHLIST Lettuce supplies and quality look good, but with transition on the horizon the market will be in flux, and we could potentially see some issues with quality and supplies in the coming weeks.

Iceberg VA: Quality and supplies look good.

Romaine & Romaine Hearts: WATCHLIST Romaine and Romaine heart supplies are good. Organic Romaine Hearts are slightly escalated due to limited supplies from the previous frost damage.

Romaine VA: Quality and supplies are good.

Green Leaf and Red Leaf: Overall quality and supplies look good.

Eastern and Western Vegetables:

Tariff Update: *President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, will not take effect until April 2nd.*

Green Bell Pepper: Lighter supply available in Nogales and South Florida. Quality is mostly good.

Color Bell Pepper: Good supply available in Nogales and South Florida. Quality is mostly good.

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

Mixed Chili Pepper: ESCALATED Supplies in general are good across most varieties out of Mexico. Jalapeño, and Poblano were good this week. Caribes and Shishito were shorter this week.

Eggplant: Lighter domestic supply continues, and quality is mixed. Good supply and excellent quality out of Mexico this week.

Slicer Cucumbers: Lighter supply crossing through Nogales and McAllen as well as Honduras. Quality is good and Markets were firmer this week due to transition; we expect to see better volume in two weeks.

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: Excellent supply available, and quality is good crossing through Nogales as well as loading in Florida.

French Beans: Watchlist Vessel delays have led to reduced availability of certain pack sizes, resulting in increased demand. While quality and condition vary, they remain generally good. Pricing has remained largely stable. In Mexico, supply is limited due to adverse weather conditions, impacting overall availability.

Zucchini/Yellow Squash: WATCHLIST Good volume and quality available shipping from all locations on Italian; markets remain tight on yellow. We should see this improve as we transition north to Sonora in two weeks. In the east Yellow will most likely stay tight until we transition to S. Georgia in May.

Herbs: ESCALATED Basil quality and supply have improved, while imported chervil remains limited. Tarragon continues to face supply challenges due to lower-than-normal yields from Colombia and Mexico, with availability expected to remain limited for the next several weeks. However, overall herb conditions are projected to improve within the next 7-14 days as temperatures stabilize. Arugula and Cilantro are also in limited supply due to frost damage, resulting in small, uneven bunches, purple stems, and mechanical issues. Some growers are implementing prorating because of these challenges.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Marginal	USA
Basil	Very Limited	Marginal	USA/MEX
Opal Basil	Very Limited	Marginal	USA
Thai Basil	Very Limited	Marginal	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Limited	Marginal	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

Stable supplies from Guatemala, cantaloupe pricing continues to settle as do the honeydew. We may see some lighter volume later in the month as easter demand increases at retail.

Cantaloupe: Cantaloupe arrivals continue to show optimum quality characteristics with very nice higher color fruit. Sizing will be peaking on reg 9s followed by jumbos then 12s. With increased supplies there should be a good percentage of all sizes to work with. Internally brix levels are maintaining a solid range of 13-15% with an excellent flavor profile.

Honeydew: Honeydew production from Honduras continued to peak over the past week but will see a rapid drop from new arrivals over the next seven days as they begin to gap. Sizing has been peaking on 5/6s which is allowing for all orders to be covered without issue. Some Honduran fruit has had some age on it from being in storage but is quickly being rotated out. We expect to see increased numbers begin by this coming Friday, which is highly anticipated from what has been in the market for the past few weeks. Brix levels are expected to be mostly in the 12-14% range based off post-harvest QC reports.

Watermelon: Seedless watermelons continue to move higher with less fruit from both Guatemala and Mexico over the past two weeks. Demand is finally surpassing supply, which is pushing the market close to the \$30 level on cartons and \$300 on bins with limited arrivals expected.

Mixed Vegetables

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Artichokes: Supplies and Quality are both good.

Asparagus: WATCHLIST Mexican production remains strong. While Caborca is currently at its peak for the season, volumes are expected to begin declining in the last week of March and continue into early April. Markets are anticipated to remain steady through next week. Overall quality is good, with consistent size distribution, particularly for large and jumbo varieties. Additionally, good supplies of white asparagus are now available.

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

Broccoli/Broccoli Crowns: WATCHLIST Quality and supplies look good. Floret Mini's are still tight, and some growers are still short on those. WE have added this item to the watchlist since transition is right around the corner. We could see issues with supplies and quality over the next few weeks.

Broccolini and Sweet Baby Broccoli: ESCALATED Quality looks good, but some growers are extremely light on supplies. Expect to be held to averages and for the price to be escalated in some markets. Demand has increased and supplies have decreased as a result of the cooler temperatures.

Brussels Sprouts: Quality and supplies look good.

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

Cauliflower: WATCHLIST Supplies are very good, but we have had some reports of weaker texture causing mechanical damage.

Celery: Quality and supplies are looking good. Organic Celery is triggered due to light supplies.

Corn: Stable supply and good quality available this week out of Mexico and Florida.

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

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

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

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

Ginger: Supplies and market are steady.

Green Cabbage: WATCHLIST Supplies and quality look good.

Green Onions: Supplies and quality look good but there have been some initial reports of light supplies going into next week for some markets.

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: ESCALATED Pricing is still escalated in some markets. Quality is good but supplies are still light with some growers. The market remains very active.

Spinach: ESCALATED Supplies and quality are good. We have seen some reports of weak texture, discoloration, wilting and there have been some initial reports of some insect damage.

Snow Peas and Sugar Snaps: Supplies from Guatemala remain strong and steady; however, volume is expected to gradually decline over the next 2-3 weeks as field transitions take place. Snows and Sugar snaps Mexican production is steady.

Onions:

The Pacific Northwest storage supplies generally take a bit of a price increase in early Q1. While this is no guarantee, we do anticipate this will be the case with white and red onions. White supplies were light to begin with in the PNW, and we do not anticipate relief there until Mexico begins crossing their supply, which should take place around the middle of Q1 in February. They are typically not very big red suppliers, so we may see the continued pattern of reds remaining elevated until we get into the Spring/Summer months in California. At the moment, all reports are that Mexico will have a healthy crop in terms of quality and volume. Because of this, we are not anticipating the market to be volatile soon. However, the Texas crop is still too early to predict. The onions are still far from 'made' that a weather event could still impact their crop. If that were to happen, we would likely see a swift increase on all colors and sizes near the end of Q1.

Potatoes:

No major changes are expected in the short term. Size profiles remain balanced at the moment, with volume deals on carton sizes alternating a bit on a weekly basis, meaning one week it will be 40/50, and the next it will be 80/90. Overall, size does seem to be more plentiful than smaller size count cartons. We will likely begin to see Norkotah supplies taper off toward the end of Q1, with most growers transitioning to Burbank's only during the beginning of Q2. When this takes place, we anticipate that supply could tighten up some as yields were believed to not be as plentiful in Burbank's as they were in Norkotahs this past year. It remains to be seen just how impacted pricing will be and on what sizes exactly. However, we do feel confident that we will not see a cheaper market than we are seeing today.

Tomatoes:

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East Coast

- **Round and Roma Tomatoes:** Harvesting on the backside of the Winter crop and volume is lower and markets are firmer; we will see lighter volume until the spring crop starts in 3 weeks. Quality is excellent.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Lighter supply and higher demand has put upward pressure on fob pricing this week. Quality remains good.

Mexico

- **Round and Roma Tomatoes:** Lighter supply in Florida has driven the demand to McAllen and Nogales pushing the fob market higher. Overall quality is good on both varieties. We expect good markets for the next three weeks.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Lighter supply and higher demand has put upward pressure on fob
- **Tomato on the Vine:** Lighter Volume available this week.

Other Fruit:

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

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

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

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

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

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

Pomegranate: Limited availability.

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

Cherries: Limited Supply Available.

Tree Fruit: Improving supply on Offshore Peaches, Plums and Nectarines available.

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

Quince: Limited supply available this week.