

Weekly Market Review

April 18, 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.*

With that, we will continue to see strong production out of South Florida on several items, with good quality and availability across multiple commodities with similar conditions being observed in Nogales and McAllen. Stable volume seen across the entire Tomato category as Florida is harvesting new fields as well as Mexico is harvesting new regions in Sonora and Baja. Quality is outstanding in all markets. We expect to see Tomatoes start in California early June. The lighter items in supply are Green Beans, premium sized Green Bells, Pickles, Shishitos, Habanero, and Caribe Peppers. We will start to see our first transitions of the season in the west on mixed vegetables; growers will begin harvesting a few peppers, corn and beans picked out of Coachella over the week. We will need to be cognizant of Holy Week and could see harvest as well as border delays. The Offshore Table Grape quality and supply are stable; Mexico is forecasted to start over the next 14 days. Offshore melons are on the backside of the season and volume will steadily decrease over the coming weeks; transition to desert fruit will start in 3-4 weeks. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. Avocado market conditions remain strong. Harvest volumes out of Mexico are expected to be limited this week due to Holy Week, with no harvesting scheduled from Thursday through Sunday. Demand for small and medium-sized fruit remains elevated as the industry prepares to meet promotional needs leading into Cinco de Mayo. Additionally, a significant portion of smaller fruit is being retained within the Mexican domestic market due to Lent and Easter, which concludes this week. The industry continues to report a high percentage of Grade 2 fruit from Mexico, a trend that is expected to persist. California continues to harvest strong volumes, providing critical support to overall supply. Historically, the market sees an adjustment following major promotional events like Cinco de Mayo. Despite multiple countries of origin contributing to supply, Mexico will continue to set the market tone until both Peru and California reach peak production levels in early June. Transition is still in full swing, and we still have growers in Huron, Oxnard, and Salinas. Very few are still in Yuma. The majority have already made the move to Salinas and those who have not should be making the move next week. The growers who are also in Huron should be making the move to Salinas next week. It won't be too much longer before we see everyone in Salinas. It is always a hectic time, but the growers have been doing everything they can to ensure a smooth transition. We are still seeing very warm weather in Yuma and the hot weather has put some stress on the products. The heat caused some increased insect pressure, mildew, internal burn, and crop fatigue. There may be some inconsistent crop performance due to this heat wave with commodities that are still coming out of Yuma. The weather in Salina's continues to look good. The temperatures will be in the mid 70's and quality and supplies are looking good. While Lettuce has been pretty steady, we will see tighter supplies and lighter weights in some markets with the last group of growers coming up on their transitions. Usually, you can expect to see the market rise and yields continue to decrease while growers are making their transitions but as for now, the outlook is good for supply and quality. Spinach is the item that has been the most affected by the heat, but the damage seems to be minimal. Continuing from the last few weeks, Endive, Escarole and Parsley remain escalated, with supply shortages driving the market. Fennel is no longer at the extreme trigger but is still escalated. Cilantro is finally off escalation, but we will add it to the watchlist just as we finish up Transition. Bok Choy, Fennel, Napa, and Leeks remain at the extreme trigger level. Bugs continue to be a

factor for the growers still in Yuma, but they are doing a great job navigating the increased insect pressure. The big concern right now is Brussel Sprouts. We saw a very significant drop in supplies across the industry. (Market Alert did go out.) You can expect to see more shortages for at least the next week and growers try navigating this supply issue. Growers, again, will do their best to prevent any supply gaps and will try to get the best quality, but some issues should be expected in the coming weeks. We have had a smooth Transition so far and are hopeful to keep that trend going!

Alert List









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

Watch List









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

Weather









SALINAS, CA

Thu 4/17	Fri 4/18	Sat 4/19	Sun 4/20	Mon 4/21	Tue 4/22	Wed 4/23	Thu 4/24
60° 49°F	62° 46°F	64° 48°F	65° 48°F	66° 47°F	65° 48°F	61° 47°F	60° 46°F
							
Cloudy	AM Clouds/PM	Partly Cloudy	Mostly Sunny	AM Clouds/PM	Partly Cloudy	Mostly Cloudy	Mostly Cloudy









OXNARD, CA

Thu 4/17	Fri 4/18	Sat 4/19	Sun 4/20	Mon 4/21	Tue 4/22	Wed 4/23	Thu 4/24
61° 52°F	60° 50°F	64° 50°F	64° 51°F	63° 51°F	63° 52°F	61° 51°F	62° 49°F
							
Cloudy	Mostly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	AM Clouds/PM	Partly Cloudy









YUMA, AZ

Thu 4/17 80° 57°F  Sunny	Fri 4/18 80° 57°F  Mostly Sunny	Sat 4/19 83° 55°F  Sunny	Sun 4/20 88° 59°F  Mostly Sunny	Mon 4/21 92° 60°F  Partly Cloudy	Tue 4/22 93° 60°F  Sunny	Wed 4/23 92° 60°F  Sunny	Thu 4/24 90° 60°F  Mostly Sunny
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HERMOSILLO, SONORA

Thu 4/17 89° 60°F  Mostly Sunny	Fri 4/18 83° 59°F  Mostly Sunny	Sat 4/19 87° 59°F  Sunny	Sun 4/20 93° 59°F  Sunny	Mon 4/21 94° 59°F  Sunny	Tue 4/22 96° 60°F  Mostly Sunny	Wed 4/23 94° 60°F  Sunny	Thu 4/24 95° 60°F  Sunny
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JALISCO, NAYARIT

Thu 4/17 85° 58°F  Mostly Cloudy	Fri 4/18 84° 57°F  Partly Cloudy	Sat 4/19 83° 56°F  Partly Cloudy	Sun 4/20 84° 55°F  Partly Cloudy	Mon 4/21 83° 54°F  Partly Cloudy	Tue 4/22 83° 55°F  Partly Cloudy	Wed 4/23 84° 57°F  Partly Cloudy	Thu 4/24 83° 58°F  Partly Cloudy
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VIZCAINO, BAJA

Thu 4/17 96° 65°F  Partly Cloudy	Fri 4/18 93° 65°F  Cloudy	Sat 4/19 96° 61°F  Sunny	Sun 4/20 97° 60°F  Sunny	Mon 4/21 95° 60°F  Partly Cloudy	Tue 4/22 94° 62°F  Partly Cloudy	Wed 4/23 93° 64°F  Mostly Cloudy	Thu 4/24 94° 63°F  Partly Cloudy
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CULICAN, SINALOA

Thu 4/17 97° 65°F  Partly Cloudy	Fri 4/18 91° 63°F  Cloudy	Sat 4/19 95° 60°F  Sunny	Sun 4/20 96° 60°F  Sunny	Mon 4/21 95° 59°F  Partly Cloudy	Tue 4/22 95° 61°F  Partly Cloudy	Wed 4/23 93° 61°F  Mostly Cloudy	Thu 4/24 95° 60°F  Partly Cloudy
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IMMOKALEE, FL

Thu 4/17 88° 59°F  Sunny	Fri 4/18 89° 63°F  Mostly Sunny	Sat 4/19 88° 64°F  Mostly Sunny	Sun 4/20 91° 65°F  Mostly Sunny	Mon 4/21 91° 65°F  Partly Cloudy	Tue 4/22 91° 66°F  Partly Cloudy	Wed 4/23 92° 68°F  Sunny	Thu 4/24 93° 66°F  Mostly Sunny
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LAKE PARK, GA

Thu 4/17 85° 54°F  Sunny	Fri 4/18 89° 60°F  Sunny	Sat 4/19 90° 61°F  Mostly Sunny	Sun 4/20 88° 63°F  Mostly Cloudy	Mon 4/21 89° 63°F  Cloudy	Tue 4/22 89° 63°F  Cloudy	Wed 4/23 91° 65°F  Partly Cloudy	Thu 4/24 91° 66°F  Partly Cloudy
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Fruits & Vegetables

Tariff Update: *President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. However, a 10% tariff will apply to fresh produce imported from other countries, potentially impacting pricing and availability for products sourced outside of Canada and Mexico.*

Avocados: ESCALATED The avocado industry closed last week at 59.4M pounds in the U.S.—a strong rebound following the third-lowest volume week of the year. Harvest activity remains steady; however, Wednesday marks the final full harvest day of the week, as most orchards will pause operations Thursday through Saturday in observance of Holy Week. Other countries of origin are gaining momentum, with week-over-week volume increases expected from California, Peru, and Colombia. The Main Crop currently reports a dry matter average of 34.5%, with approximately 13.7M pounds harvested during week 15.5. Dry matter is averaging 26%, and sizing is peaking on the 48s and 60s. California has significantly ramped up harvest volumes in preparation for Cinco de Mayo, with strong production anticipated through July. The Traviesa Crop has also begun, with shipments heading to both the U.S. and European markets. Although sizing is currently skewing smaller, harvest volumes are expected to accelerate following the Easter holiday. Colombia is projected to offer promotable volumes of medium and small fruit beginning mid-May and continuing into June.

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

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

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

Berries

Strawberries: Supplies are lighter this week due to recent cooler temperatures. Production has now fully transitioned to the West as the Florida season has concluded. Green fruit sets remain strong in Santa Maria, and production is expected to increase significantly as harvest crews shift to piece-rate picking. The region is on track to reach peak production between mid-to-late April and early May, with later-planted blocks expected to carry into June. In Oxnard, volume is anticipated to ramp up steadily, supported by favorable weather conditions that are encouraging a flush in supply. The region is projected to peak in late April. Similarly, Salinas/Watsonville is forecasted to see increasing production over the coming weeks. With no disruptive weather in the forecast, more consistent volume is expected moving forward.

Blackberries: Quality remains strong, with medium to large sizing, good sheen, and firm, mostly black fruit. However, there are some quality concerns, including red cell regression, attached calyx, and

occasional soft or leaking fruit. Volume is holding steady at a consistent peak and is expected to continue through the end of July. On the organic side, volumes have begun to decline, as the season is wrapping up slightly earlier than anticipated.

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

Blueberries: Blueberry volumes remain light as the South American season has concluded, leaving Mexico as the primary source of supply. However, Mexican production is now beginning to taper off. In Florida, cooler temperatures over the past few weeks have caused slight delays in harvest. Improved availability is anticipated starting next week as Georgia begins production and additional domestic regions come online with increased volume.

Citrus

Oranges: Fruit quality remains excellent and offers great eating quality. Pricing on smaller sizes, 113's and 138's, continues to strengthen as the size structure is now trending heavier to mid-sizes, so ample lead time will be necessary for orders on small sizes with many shippers now holding to averages on the small sizes.

Lemons: We continue to see very good quality out of all growing areas in California. Smaller sizes are becoming lighter in supplies for the next 4 to 6 weeks, while mid-to-large sizes remain readily available.

Limes: ESCALATED Supplies are lighter this week during Holy Week, market is higher. Sizing continues to peak on smaller sizes, including 200's, 230's, and 250's, with large size fruit limited. Look for the market to continue strong for at least the next few weeks as once Easter pull is over, we will be seeing increased demand for Cinco de Mayo. Quality and condition are good.

Imports/Specialties: Blood Oranges are still being packed but will be finishing for the season soon, sizing is running small. Cara's will be finishing in about a month. California Mandarins, and Grapefruit are in good supply with very good quality.

West Coast Lettuce

Iceberg: WATCHLIST: Lettuce supplies are tightening up a bit with transition in full swing. We could potentially see some issues with quality and supplies but for now, things seem to be in good shape. We have had reports of wilting and weak tips affecting the outer leaves due to the heat but overall, quality is still good. You can expect lighter weights and smaller heads from some growers until everyone is settled into Salinas.

Iceberg VA: Quality and supplies look good for now but there could be some supply and quality issues throughout transition.

Romaine & Romaine Hearts: WATCHLIST Romaine and Romaine heart supplies are good, but the market is trending higher due to increased demand. Due to the warmer weather, insect pressure and light blistering have been reported. Organic Romaine hearts are still escalated due to limited supplies.

Romaine VA: Quality and supplies are good but there could be some quality and supply issues throughout transition.

Green Leaf and Red Leaf WATCHLIST: Overall quality and supplies look good, but we could see potential issues on supplies and quality throughout transition. Lighter weights and a smaller size profile have been reported.

Eastern and Western Vegetables:

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Green Bell Pepper: Lighter supply available in Nogales and South Florida. Markets are higher and quality is mixed. Limited supply on larger sizes; stable volume on Medium and Choice Pepper. We expect to see some light availability out of Coachella in two weeks.

Color Bell Pepper: Good supply available in Nogales and South Florida. Quality is mostly good. Canada started crossing limited volume on HH Bells and this will gradually increase over the coming weeks. We should see some La Rouge yellow and reds out of the desert 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. Jalapeño and Poblano were good this week. Caribes, Habanero 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. We are seeing short supply, particularly on selects and supers. Quality is good and Markets were firmer this week due to transition; we expect to see better volume in two weeks.

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

French Beans: WATCHLIST Production and quality are good out of Guatemala, though vessel delays continue to impact shelf life, reducing product longevity upon arrival. Meanwhile, Mexico maintains a good supply of French beans, helping to support overall market demand and availability.

Zucchini/Yellow Squash: Good volume and quality available shipping from all locations on Italian and yellow from Mexico and Florida. Transition to South Georgia and California should start in 3 weeks.

Herbs: ESCALATED In the eastern regions, basil and mint quality has been impacted by ongoing rain in Colombia, while the supply of imported chervil is down due to adverse weather conditions in Ecuador. On the West Coast, basil supply and quality are gradually improving, though the recovery has been slower than anticipated. Continued improvement is expected in the coming weeks as weather conditions stabilize across key growing regions. Arugula and Cilantro are also in limited supply due to frost damage, resulting in small, uneven bunches, purple stems, and mechanical issues. Some growers are implementing 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: Stronger retail demand and delayed vessels have quickly shortened the cantaloupe market, pushing FOB pricing higher this week. We do expect transition from our offshore program to the desert on May 19th.

Cantaloupe: Quality is excellent and fruit shelf life is strong with extended shelf life and high shell color. Brix levels are holding mostly in that 14-16% range that has been seen in recent weeks, sizing profile is moving away from mostly jumbo fruit to a more balanced 9ct to 12ct profile by the end of the week arrivals.

Honeydew: Honeydew production remains strong and peaking on 5s-5Js, 6ct has been extremely limited. We are seeing a bit more scarring but overall quality has been solid. Brix levels are mostly in the 12-14% range.

Watermelon: Watermelon supplies should see a slight uptick this week as more growers begin harvesting in Mexico and Florida. Smaller sizes will remain tight, and new fields producing mostly larger fruit. Demand is still slow due to cooler weather across much of the country. Prices are expected to stay strong on 45s and 60s, while 36s remain sluggish with rising volume.

Mixed Vegetables

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Artichokes: Quality and Supply are good.

Asparagus: ESCALATED Volumes out of Caborca and San Luis remain low due to ongoing weather challenges and the natural seasonal decline. Peru has begun shipping containers, with the first arrivals landing two weeks ago. Improved volume is anticipated after Easter, which should help ease current supply pressures. Additionally, Michigan is expected to begin production in May. Markets remain very active, driven by limited availability from Mexico, and are expected to remain firm until Peruvian shipments become more consistent.

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 minis are still tight, and Florets and Crowns are tightening up a bit. We could see issues with supplies and quality over the next

few weeks. We are watching out for the effects of the heat on the fields and for supply issues due to transition.

Brocolini and Sweet Baby Broccoli: WATCHLIST Quality looks good, and most growers are looking good on supplies. We will keep this item on the Watchlist as we go into transition.

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

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

Cauliflower: WATCHLIST Supplies are okay right now. The heat helped with the remaining crops in Yuma, but we could see that change as everyone makes their way into Salinas.

Celery: Quality and supplies are looking good.

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

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

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

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

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

Ginger: Supplies and market are steady.

Green Cabbage: WATCHLIST Supplies and quality look good.

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

Mushrooms: Promotable volume available and quality is good.

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

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

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

Red Cabbage: WATCHLIST Quality is good, but supplies are still light with some growers. The market remains very active.

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

Snow Peas and Sugar Snaps: Guatemalan production of snow peas and sugar snaps remains steady, though quality issues may arise due to ongoing humidity in the growing regions. In contrast, Mexican production for both commodities remains stable, with no major concerns reported at this time.

Onions:

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

Potatoes:

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

Tomatoes:

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East Coast

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

Mexico

- **Round Tomatoes:** Steady volume out of Sonora and Sinaloa on all sizes; Quality is outstanding.
- **Roma Tomatoes:** Ample supply from Sonora and Sinaloa are crossing through Nogales and McAllen. Quality is good.

- **Snacking Tomatoes (Cherry, Grape and Medley):** Steady supply and light demand have put downward pressure on FOB pricing, quality remains good.
- **Tomato on the Vine:** Stable Volume available this week.

California

- Forecasted to start in early June.

Other Fruit:

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

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

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

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

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

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

Pomegranate: Limited availability.

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

Cherries: Limited Supply Available.

Tree Fruit: Offshore Peaches, Plums and Nectarines are still available.

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

Quince: Limited supply available this week.