

## Weekly Market Review

April 4, 2025

### Overview

**Tariff Update:** *President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, “WILL NOT” be implemented as Fresh Produce from Canada and Mexico will not be affected.* 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. Markets are also improving on tomatoes as we start to harvest from the Spring crops. Romas seem to be the most plentiful followed by large round tomatoes. Mid-range sizes seem to be the shortest and will most likely see this condition for a week to ten days. We are seeing the same conditions in Sonora and Sinaloa with excellent quality coming available. We are also seeing short supply on Yellow Squash, premium sized Green Bells, Pickles, Shishitos, Red Fresnos and Caribe Peppers. We will start to see of 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 next two weeks. The Offshore Table Grape quality and supply are stable, as are the offshore melons. 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. Avocado harvest volumes have dropped significantly this week as many importers are choosing to avoid heavy border crossings on Wednesday and Thursday due to ongoing tariff concerns. The previous round of tariffs—imposed for just three days—resulted in a 25% cost to importers, with no refunds issued, adding to the current caution. With continued uncertainty around the timing and implementation of tariffs, crossings remained light, and the supply chain is expected to tighten rapidly. Looking ahead to next week, price increases are likely driven by strong in-field demand as buyers work to replenish depleted inventories. Demand remains high for small and medium-sized fruit, and the price gap between small and large sizes is narrowing as smaller fruit prices continue to rise. Additionally, a large portion of small fruit remains in the Mexican domestic market to support Lent and Easter consumption. April is projected to be one of the most challenging months of the year, with volatile availability driven by the unknowns surrounding tariffs, as well as the impact of Holy Week and increased Cinco de Mayo demand. These factors will likely cause significant week-over-week swings in volume, continuing the volatility that has characterized much of the year so far. Relief is expected in May and June as higher volumes from Colombia and Peru enter the market, which should help stabilize supply and pricing. On a positive note, California has entered full production this week, with favorable weather and market conditions supporting steady harvests. The industry expects to see increased availability of California fruit by mid-April. Mexico’s asparagus season is approaching its end, leading to a notable tightening in supply. Hot weather and soil fatigue are contributing factors to both limited availability and an increase in quality-related concerns. At the same time, Peru is gradually ramping up production, though current volumes remain limited. Full production capacity out of Peru is expected by the end of April, which should help alleviate some market pressure. However, given the timing of this transition, tight supply conditions are likely to persist until Peru reaches full output. Transition is in full swing, and you will see growers in Huron, Oxnard and Salinas. Some are still in Yuma, but the majority have already started to move. Many growers will be in Salinas starting next week while others are just a week or 2 away from making the move. It is always a hectic time, but the growers are doing everything they can to ensure a smooth transition. We had a heat advisory in effect last week for Yuma and the hot weather did put some stress on the products. The heat caused some increased insect pressure, mildew, internal burn and crop fatigue. The good news is that Yuma has seen a cooling trend this week so those crops will get some relief. The growers are navigating the best that they can, but there may be some inconsistent crop performance due to this heat wave with commodities that are coming out of Yuma. The weather in Salina’s is also looking good for the upcoming week. Overall, for now, supplies are looking good in Yuma and Salinas, but with transition in full swing, we will also see the normal issues with supplies and quality as we go through this process. Lettuce is already seeing

tighter supplies and lighter weights in some markets but overall, things are steady, and the majority of growers seem to be in good shape. You can expect to see that market continue to 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, Cilantro, Parsley and Spinach remain escalated, with supply shortages driving the market. Bok Choy, Fennel, Napa and Leeks remain at the extreme trigger level. Red Cabbage is still slightly escalated and looks like it will remain that way through transition. Bugs are still a factor for the growers in Yuma, but they are doing a great job navigating the increased insect pressure. 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.

### **Alert List**









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

### **Watch List**









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

## Weather









### OXNARD, CA

Thu 4/3	Fri 4/4	Sat 4/5	Sun 4/6	Mon 4/7	Tue 4/8	Wed 4/9	Thu 4/10
61°   46°F	65°   47°F	69°   51°F	72°   51°F	67°   52°F	67°   54°F	74°   56°F	75°   57°F
 Mostly Sunny	 Mostly Sunny	 Sunny	 Mostly Sunny	 Partly Cloudy	 Sunny	 Partly Cloudy	 Partly Cloudy









### YUMA, AZ

Thu 4/3	Fri 4/4	Sat 4/5	Sun 4/6	Mon 4/7	Tue 4/8	Wed 4/9	Thu 4/10
71°   49°F	78°   53°F	83°   59°F	86°   56°F	91°   59°F	94°   62°F	99°   66°F	103°   68°F
 Sunny	 Mostly Sunny	 Sunny	 Sunny	 Mostly Sunny	 Sunny	 Sunny	 Mostly Sunny









### HERMOSILLO, SONORA

Thu 4/3	Fri 4/4	Sat 4/5	Sun 4/6	Mon 4/7	Tue 4/8	Wed 4/9	Thu 4/10
75°   50°F	72°   50°F	82°   56°F	89°   60°F	94°   62°F	98°   62°F	101°   65°F	106°   68°F
 Partly Cloudy	 Mostly Sunny	 Mostly Sunny	 Mostly Sunny	 Sunny	 Sunny	 Sunny	 Sunny









### JALISCO, NAYARIT

Thu 4/3	Fri 4/4	Sat 4/5	Sun 4/6	Mon 4/7	Tue 4/8	Wed 4/9	Thu 4/10
82°   52°F	80°   52°F	78°   50°F	78°   49°F	81°   51°F	83°   55°F	86°   56°F	89°   59°F
 Sunny	 Sunny	 Sunny	 Sunny	 Sunny	 Mostly Sunny	 Mostly Sunny	 Sunny









### VIZCAINO, BAJA

Thu 4/3	Fri 4/4	Sat 4/5	Sun 4/6	Mon 4/7	Tue 4/8	Wed 4/9	Thu 4/10
71°   48°F	72°   45°F	81°   49°F	85°   56°F	90°   56°F	95°   59°F	97°   62°F	100°   63°F
 Partly Cloudy	 Partly Cloudy	 Sunny	 Sunny	 Sunny	 Sunny	 Sunny	 Sunny









### CULICAN, SINALOA

Thu 4/3	Fri 4/4	Sat 4/5	Sun 4/6	Mon 4/7	Tue 4/8	Wed 4/9	Thu 4/10
86°   60°F	83°   54°F	85°   52°F	89°   53°F	92°   56°F	93°   57°F	94°   59°F	98°   61°F
							
Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

### IMMOKALEE, FL

Thu 4/3	Fri 4/4	Sat 4/5	Sun 4/6	Mon 4/7	Tue 4/8	Wed 4/9	Thu 4/10
90°   68°F	91°   68°F	92°   68°F	91°   68°F	92°   69°F	79°   58°F	82°   60°F	83°   58°F
							
Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny	Mostly Sunny	Scattered Thunderstorms	Sunny	Mostly Sunny

### LAKE PARK, GA

Thu 4/3	Fri 4/4	Sat 4/5	Sun 4/6	Mon 4/7	Tue 4/8	Wed 4/9	Thu 4/10
91°   69°F	92°   68°F	90°   67°F	88°   70°F	75°   53°F	72°   47°F	71°   48°F	76°   52°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Rain	AM Showers	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” be implemented as Fresh Produce from Canada and Mexico will not be affected.*

**Avocados: ESCALATED** Last week was the second largest volume week of the year – coming in at 76.8M pounds. This was only shy of the Super Bowl by 2.2M pounds. The industry has been working relentlessly to build US inventories before potential tariffs, and while it’s a lot of fruit for a depressed market, it’s a comfortable cushion for growers to work with. Projections for next week call for 52M pounds from Mexico, and at the current harvest rate, we’ll be lucky to hit 30M pounds. Demand remains high on small and medium fruit, and the market gap between large and small fruit is narrowing as prices increase on smaller sizes. Additionally, a large number of small fruits are staying in the Mexican national market due to Lent and Easter. Mexico’s Main Crop currently has a dry matter estimate of 34.5%. California harvests continue to ramp up. Approximately 11.2M pounds were harvested in week 13. The dry matter is averaging 25%. Sizing is peaking on the 48s and 60s. The industry expects harvest to be in full swing by mid-April.

**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 improvement until 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 4 weeks.

## **Berries**

**Strawberries:** Overall, supplies remain somewhat steady, but markets are expected to tighten as Mexico's season has effectively concluded, and Florida is projected to finish within the next 3–7 days due to seasonality. Production is transitioning to western regions, though volumes remain limited in the short term. In Santa Maria, volume will stay light over the next few weeks as the region continues to recover from recent rainfall. A rebound is expected by mid-April, with strong green fruit sets supporting increased production as crews transition to piece-rate harvesting. The region is on track to peak between mid-April and early May, with later-planted blocks extending into June. Organic fields are showing good volume, although culling remains high due to prior weather-related damage. In Oxnard, rain is also impacting the volume ramp-up, with recovery expected over the next two weeks. Peak production is projected for late April. The Salinas/Watsonville region experienced more rainfall last week, delaying early-season progress. Some scratch pickings occurred prior to the rain, but crews are now focused on maintaining plant health. Initial packing is anticipated to begin mid to late April as the region ramps up. In Florida, strawberry quality ranged from good to fair this week. A brief rain event caused minimal disruption, though bruising and over ripeness are concerns due to heat-driven ripening. Pest pressure remains low, with no decay reported. Production volumes are declining sharply as growers wind down the season in anticipation of rising temperatures.

**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:** Fruit quality looks strong, with a vibrant red color, good firmness, and a nice range of variety sizes, primarily medium with occasional larger berries. While some overripe and crumbled fruit is being observed, crews are actively working to keep these out of final packs. Raspberry volume remains at a consistent peak and is expected to hold through the end of April. Organic production is also performing well, with solid availability anticipated through March as we move into peak harvest.

**Blueberries:** Weather in Mexico remains hot, with temperatures ranging from 80s to 90s during the day and 50s at night. Conventional volume is at peak production, expected to last through mid-April, followed by a steady decline into May. Organic production has concluded for the season, and the supply gap will persist until August. Some growers are currently pruning ranches, which may slightly reduce volume in the short term. Quality is excellent overall, with strong flavor, bloom, and appearance, although isolated issues of redberries, soft/leaking fruit, and shriveling are being reported. Due to high heat and rain events earlier in the season, Chilean production has finished, wrapping up earlier than expected. As we receive the final shipments, there are more issues with softness and shriveling, especially in prepack and bulk formats. However, the packhouse maintains clean packs with good color, bloom, and sizing. Weather has warmed up, with highs in the 50s–60s and lows in the 40s. Rain last week briefly slowed production, but the region is now bouncing back and entering peak organic production, which will last through April. Florida production is underway, with early-season fruit showing great quality, including some strong Jumbo volumes. Initial cooler weather and rain delayed the harvest and pushed peak estimates back by one to two weeks. However, production is now gaining momentum and is expected to peak in April, with a sharp decline in May. Only conventional fruit is being harvested in this region at this time.

### **Citrus**

**Oranges:** Fruit remains excellent and offers great eating quality. Pricing on smaller sizes, 113's and 138's, continues to strengthen as the size structure is switching, but the overall market is stable. Rain in some growing areas earlier this week slowed harvesting, but good supplies will continue.

**Lemons:** Good supplies and very good quality out of all growing areas in California. Smaller sizes are becoming more limited, while larger sizes remain readily available.

**Limes: ESCALATED** Demand is steady with sizing continuing to peak on smaller sizes, including 200's, 230's, and 250's, with large size fruit limited. Quality and condition are better. Market is steady.

**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 with transition starting. The market will be in flux, and we could potentially see some issues with quality and supplies in the coming weeks. We have had reports of wilting and weak tips affecting the outer leaves due to the heat.

**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 has 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.

**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:** Excellent supply available but quality may be hit and miss as we hit some blocks that were impacted by weather earlier this year. Stable volume expected to cross in Nogales as well as harvested in South Florida.

**French Beans: WATCHLIST** Vessel delays continue to led to reduced availability on certain pack sizes, resulting in increased demand. While quality and condition vary, they are generally good overall. Pricing remains steady, and there continues to be a good supply of French beans from Mexico.

**Zucchini/Yellow Squash: WATCHLIST** Good volume and quality availably 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. Geogia in May.

**Herbs: ESCALATED** Basil's supply and quality remain marginal out of all growing regions due to the ongoing cold weather and rainfall. Additionally, Tarragon and other herbs continue to be affected by the same weather conditions. Supply is expected to improve within the next 7-10 days, pending more favorable growing conditions. 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
<b>Arugula</b>	Limited	Marginal	USA
<b>Basil</b>	Very Limited	Marginal	USA/MEX
<b>Opal Basil</b>	Very Limited	Marginal	USA
<b>Thai Basil</b>	Very Limited	Marginal	USA/MEX
<b>Bay Leaves</b>	Steady	Steady	USA/COL
<b>Chervil</b>	Limited	Limited	USA
<b>Chives</b>	Steady	Steady	MEX
<b>Cilantro</b>	Limited	Marginal	USA/MEX
<b>Dill</b>	Steady	Steady	USA/MEX
<b>Epazote</b>	Steady	Steady	MEX
<b>Lemongrass</b>	Steady	Steady	USA
<b>Marjoram</b>	Steady	Steady	USA
<b>Mint</b>	Steady	Steady	USA



<b>Oregano</b>	Steady	Steady	USA
<b>Italian Parsley</b>	Steady	Steady	USA
<b>Rosemary</b>	Steady	Steady	USA
<b>Sage</b>	Very Limited	Marginal	USA
<b>Savory</b>	Steady	Limited	USA
<b>Sorrel</b>	Steady	Steady	USA
<b>Tarragon</b>	Steady	Steady	MEX
<b>Thyme</b>	Very Limited	Marginal	USA
<b>Lavender</b>	Steady	Steady	USA
<b>Lemon Thyme</b>	Steady	Steady	USA
<b>Lime Leaves</b>	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:** 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:** Supplies and Quality are both good.

**Asparagus: ESCALATED** Caborca/San Luis volume continues to be low due to weather in the growing region. Markets are more active with decreased volume from Mexico. The first Peruvian containers of the season are expected to arrive at the end of this week. Supplies are expected to remain limited for the next several weeks, which will likely lead to higher markets.

**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.

**Broccolini 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:** 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 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: WATCHLIST** Seeing lighter supply out of Florida and Mexico as winter crops wind down. Markets have firmed up and quality remains good. We should see new crop out west from Coachella over the next two weeks.

**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: 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:** Production of Guatemalan snow peas and sugar snaps remains steady; however, quality issues may persist due to elevated humidity in the growing regions. Meanwhile, Mexican production for both snow peas and sugar snaps continues to be stable, with no significant 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 also are expected to have a lot of product. So, in the first 2 months of Q2 (April/May) there is not presently a lot of optimism. However, June is a bit of a wildcard. At that point, Texas is done,

the Northwest is done, Southern Cal will be mostly finished, and we will be exclusively into New Mexico and Central California at that time. It is basically a fresh start during that time, so the market has as good of a chance of improving as it does staying stagnant.

### **Potatoes:**

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

### **Tomatoes:**

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### **East Coast**

- **Round Tomatoes:** Growers are breaking new fields this week improving availability however mid-sized fruit will be limited this week. The quality looks fantastic; we expect to see good volume over the next several weeks.
- **Roma Tomatoes:** As growers begin to harvest newer blocks, we expect to see volume improve. Quality is good.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Improving supply and light demand have put downward pressure on fob pricing this week on all domestic snacking tomatoes. Quality remains good.

### **Mexico**

- **Round Tomatoes:** Improving volume out of Sonora and Sinaloa on large sized fruit; mid-sized will be limited over the next 10 days. We should see more stability in the market this coming week. 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):** Improving supply and light demand have put downward pressure on fob pricing this week on all domestic snacking tomatoes. Quality remains good.
- **Tomato on the Vine:** Stable 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.