

# Weekly Market Review

June 6, 2025

## Overview

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

South Florida will wrap late spring production this week and will be loading out of South Georgia for the rest of the month. We are going to be fighting some weather here in the southeast but don't see any major delays on the horizon. In Nogales and McAllen, volume is steady on tomatoes; most other veg will slowly scale back for the summer and move to regional locations. Jalisco and Baja Monterey will take on a majority of the Mexican volume on tomatoes. Quality is very good out of Mexico; Florida quality is good and should finish the season on a positive note and have a relatively smooth transition this week to South Georgia and South Carolina. Tomatoes out of Coachella should start early next week. Mixed veg transitions are well underway to California and South Georgia. Good production is available on Corn and Green Bells out of Coachella this week, and quality is outstanding. New crop Slicer Cucumber is ramping up out of Georgia and Baja. Items that remain light in supply are premium sized Green Bells, Pickles, Shishito Pepper, Tomatillo, and Habanero. The offshore Table Grape quality and supply are stable on reds; greens are tight this week. Mexico is starting to cross fruit this week but are seeing lower than expected volume and quality is fair at best due a mix of unseasonable weather events over the past week. Heavy rain and wind combined with early heat has impacted some of the crop; we are assessing this and will update as soon as possible. Please stay offshore for at least another week then move west to Nogales and Coachella. Offshore Melons are done for the season, and we are now in the desert. Fruit quality is outstanding. 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, Cherries, Red/ Black Plums and Apricots, there are also Peaches available in the east out of Georgia and South Carolina. Market conditions remain steady this week. Demand is consistent across most channels and is expected to increase throughout June. Imports from Mexico continue to decline as the season nears its end. Mexican fruit is showing high dry matter content, and a significant portion of the crop is being consumed domestically due to strong internal demand. Additionally, Mexico's rainy season has officially begun, which may affect harvest volumes in the coming weeks. California production remains stable and continues to deliver excellent quality. Arrivals from Peru are increasing on both coasts, and the season is now underway with strong summer program interest across all sizes. Mexico's fiscal year (July-June) shipments are tracking at 89% of the revised projections. The revised estimate for the year is 2.3 billion pounds, and with only one more month to go, actuals are expected to close closer to 2.1 billion pounds for the year. Jalisco's next crop is expected to begin in 2 weeks. Michoacán's Flora Loca crop is on track for July start. Mexico's market share will continue to decline, while California and Peru reach their peak volumes in June and July. Peru's total volumes to the U.S. have projections exceeding 70M pounds for six weeks this summer. This is a stark difference from last year when only one week out of the whole summer reached 60M pounds. The weather in Salinas has evened out this week and we are seeing normal temps for this time of year. With those normal temps we will like see the insects getting active. We will be keeping an eye on the insect pressure. It has been minimal so far, but it is still early in the season. Overall, supplies and quality are still looking good. Lettuce supplies and quality are starting to change a bit with some growers due to

Sclerotinia and INSV. There has been a decrease in supplies. We may see the market firm up a bit. Broccoli and Cauliflower are both still good in quality and supplies seem to be back to normal. The warmer weather is helping everything grow. Broccolini is still a bit tight, but supplies have improved. You should have no issues having your orders filled. Spinach quality and supplies have also improved. We will still be watching that commodity but for the upcoming week supplies look good. Brussel Sprouts continue to improve. The market is still escalated but is trending down. Quality and supplies are improving. Jumbos are still a bit limited. 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**
- Brussel Sprouts – **ESCALATED**
- Celery Organic – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Hot Peppers (Caribe, Habanero and Shishito) – **ESCALATED**
- Leeks – **ESCALATED**
- Limes – **ESCALATED ON SMALL SIZES**  
**EXTREME ON LARGE SIZES**
- Napa – **ESCALATED**
- Table Grapes – **ESCALATED**

### **Watch List**









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

### **Weather**









#### **SALINAS, CA**

Thu 6/5	Fri 6/6	Sat 6/7	Sun 6/8	Mon 6/9	Tue 6/10	Wed 6/11	Thu 6/12
66°   55°F	67°   54°F	69°   54°F	69°   54°F	67°   54°F	66°   54°F	66°   53°F	66°   52°F
							
Partly Cloudy	AM Clouds/PM	Partly Cloudy	Mostly Sunny	Partly Cloudy	AM Clouds/PM	Mostly Sunny	Mostly Sunny









#### **OXNARD, CA**

Thu 6/5	Fri 6/6	Sat 6/7	Sun 6/8	Mon 6/9	Tue 6/10	Wed 6/11	Thu 6/12
66°   58°F	66°   58°F	66°   57°F	69°   58°F	69°   58°F	69°   59°F	67°   58°F	67°   58°F
							
AM Clouds/PM	AM Clouds/PM	Mostly Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy









### COACHELLA, CA

Thu 6/5	Fri 6/6	Sat 6/7	Sun 6/8	Mon 6/9	Tue 6/10	Wed 6/11	Thu 6/12
101°   75°F	103°   75°F	107°   78°F	111°   79°F	111°   79°F	107°   79°F	107°   77°F	103°   74°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









### HERMOSILLO, SONORA

Thu 6/5	Fri 6/6	Sat 6/7	Sun 6/8	Mon 6/9	Tue 6/10	Wed 6/11	Thu 6/12
103°   72°F	105°   73°F	108°   75°F	111°   76°F	107°   77°F	106°   76°F	105°   76°F	102°   76°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









### JALISCO, NAYARIT

Thu 6/5	Fri 6/6	Sat 6/7	Sun 6/8	Mon 6/9	Tue 6/10	Wed 6/11	Thu 6/12
87°   66°F	87°   66°F	87°   67°F	88°   68°F	84°   67°F	81°   66°F	82°   66°F	80°   66°F
							
Partly Cloudy	Mostly Sunny	Mostly Sunny	Scattered Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms

### VIZCAINO, BAJA

Thu 6/5	Fri 6/6	Sat 6/7	Sun 6/8	Mon 6/9	Tue 6/10	Wed 6/11	Thu 6/12
92°   58°F	94°   58°F	97°   61°F	100°   63°F	99°   63°F	97°   62°F	93°   62°F	90°   61°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

### LAKE PARK, GA

Thu 6/5	Fri 6/6	Sat 6/7	Sun 6/8	Mon 6/9	Tue 6/10	Wed 6/11	Thu 6/12
84°   72°F	92°   75°F	93°   75°F	91°   73°F	88°   72°F	88°   72°F	90°   71°F	92°   72°F
							
Thunderstorms	Partly Cloudy	Isolated Thunderstorms	PM Thunderstorms	Scattered Thunderstorms	AM Thunderstorms	PM Thunderstorms	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** The U.S. avocado industry closed last week at 54.5M pounds, marking the fourth consecutive week of declining total volume. California volumes dropped 31%, largely due to the Memorial Day holiday, with some growers opting to delay harvest amid softer field pricing and the national holiday. Markets across all sizes have remained steady. For the remainder of June, Mexico is projected to average just 27M pounds per week. However, combined volumes from California and Peru are expected to closely match Mexico's market share. In Mexico, the onset of the rainy season may impact future harvest volumes. The current crop is yielding mostly small fruit with a high percentage of Grade 2s, and the Main Crop's dry matter content is estimated at 37%. California fruit is averaging 27% dry matter, with sizing peaking on 48s and 60s. Given the smaller sizing expected from Mexico's Loca crop, allowing the California crop to size up will help maintain balance through summer. Peru's season remains a key focus, with projected volume to the U.S. up 75% compared to last year's low season. Although total imported volume to the U.S. has been revised down by 13M pounds, the impact will be minimal spread over the next 20 weeks. Colombia's Traviesa crop is performing well, with 130M pounds still expected for the spring-summer window, continuing to favor smaller sizes (60s and below) and offering strong promotional potential.

**Bananas: ESCALATED** Banana imports remain extremely light for the next 4 weeks. We continue to struggle with several challenges of recent including record demand and overall lighter supply from the tropics. We are also seeing some logistical challenges due to the labor strikes in Panama that are impacting the global supply. Due to these challenges, we could see minor pro-rates across the network over the next four weeks. Overall, banana quality has been good and improving as we enter the summer grow cycle. Overall inventories are light, and we are seeing higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to keep a heavier than normal inventory on hand and self-manage color to protect from shorts.

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

**Table Grapes: ESCALATED** Supply is tightening up as the offshore season rapidly comes to a close. Mexico is just getting started and has been dealt a blow from the weather; recent heavy wind and rain combined with early heat in Caborca, as well as Hermosillo has impacted the Mexican crop. We are seeing quality issues on the early varieties such as splits on reds and staining on the greens. Losses in the region could be upwards of 2 million boxes of fruit. Having said that, we are recommending secure offshore fruit this week, and sub over to reds where possible. The next ten to 14 days could be bumpy relying on Mexico and Coachella, we hope to see early valley fruit out of Arvin by the 20<sup>th</sup> of June which will help the supply chain. Once we transition to California, we expect volume to be stable, barring any unforeseen impacts to the crop.

## **Berries**

**Strawberries:** Strawberry production in Santa Maria and Watsonville/Salinas continues to perform well under generally favorable conditions. In Santa Maria, last week's unexpected heat pushed daytime highs into the mid-90s in some areas, accelerating ripening and increasing fruit sensitivity. Cooler

temperatures have since returned, improving firmness and helping stabilize quality. Sizing is trending smaller, mostly in the 20–24 count range, and some blocks are transitioning to post-peak, though others are just ramping up and expected to reach full production in the coming weeks. Growers are maintaining focus on minimizing bruising, green tips, and overripe fruit, while additional acreage will begin shifting to cannery next week. In Watsonville and Salinas, weather has remained ideal with consistent highs in the 60s–70s and no rain in the forecast. Quality is excellent as Watsonville nears its peak, likely within a week, while Salinas is about two weeks behind. Clamshell counts remain steady, with most varieties packing between 12–24 straws per case. Minor issues such as bruising and split or button-nosed tips persist but are manageable. Dry calyx has largely subsided, and overall volume is trending upward. Labor shortages over the holiday weekend briefly impacted harvest but crews have since returned to full capacity. Strong flower sets and ripening fruit across both regions are supporting healthy momentum as the season progresses.

**Blackberries:** Blackberry production in Mexico remains in peak, supported by cooler temperatures in the 70s–80s as the rainy season sets in. Fruit quality is strong overall, with medium to large sizing, good sheen, and firmness, though some red cell regression, attached calyx, and soft or leaking berries persist due to prior heat. Volume is expected to remain steady through mid-to-late June before tapering off slightly; upcoming rains may impact short-term yields, but overall supply should remain relatively consistent throughout the year, with a temporary dip in July. In Watsonville, warm and stable weather continues, and conventional production is ramping up. Fruit quality has been excellent, with large, juicy berries, though volumes remain light with only a few pallets shipping on select days. Stronger volume is expected by June, with steady growth anticipated through September. Central Valley production will begin for the first time this year in mid-June, running through the end of July. Hot weather, with highs in the 80s–90s, is expected to continue, though a potential heatwave could affect yields. Availability from the Central Valley will be limited due to program commitments, but some open-market fruit may be accessible on a weekly basis.

**Raspberries:** Raspberry production in Mexico is entering the rainy season, bringing cooler temperatures with highs in the 70s–80s and lows in the 50s–60s. These conditions should support improved fruit quality, though crews remain alert for potential rain-related damage over the next 7-10 days. Fruit shows a strong red color, good firmness, and mostly medium sizing with some larger berries. Some overripe, unevenly ripened, and crumbled fruit remains due to prior heat stress, but crews are working to keep affected fruit out of packs. May volumes have been strong, with peak production expected in late June, though near-term volumes may dip slightly due to the weather. In Watsonville, warm, stable weather has prevailed, with highs in the 60s/low 70s and lows in the 40s–50s. Conventional raspberry production remains light and is expected to stay limited until late June. Despite lower volumes, fruit quality has been encouraging, with good color and sizing noted from early harvests.

**Blueberries: WATCHLIST** Overall blueberry volumes will be lighter over the next few weeks. In Mexico, the arrival of the rainy season has brought cooler temperatures (highs in the 70s–80s, lows in the 50s–60s), which should help improve quality. However, rain-related damage is a concern over the next 10 days or more. Conventional volume continues to trend downward and is expected to decline by July, while organic production is set to resume in August. Fruit is sizing between 12–16mm, with good flavor, bloom, and appearance, although some issues persist, including softness, leaks, and heat-related shriveling in redberries. Jumbo volume is limited. In Florida, hot, humid, and rainy conditions (highs in the upper 80s to 90s) have pushed the region to the end of its season. Rain events earlier in the month impacted production, and while fields have been cleaned up, quality has remained fair. The season is

nearly finished. While Georgia remains in peak production this week, most growers have shifted the remaining fruit to the freezer packers. Additionally, volumes are expected to decline quickly starting next week as the region moves past its peak. In California's Central Valley, both conventional and organic production have reached full speed. The weather remains hot (80s–90s), with a potential heatwave forecasted for the coming weeks that could impact yields. Conventional volumes are ramping up into peak June production, while organic production is nearing its peak, expected to last through mid-June. Overall quality is excellent, with strong bloom, size, and flavor. Availability is solid, and some jumbo fruit is also present. In the Pacific Northwest, conditions have been ideal, with highs in the 70s and 80s. Oregon's season is expected to begin in the second half of June for both conventional and organic, while British Columbia and Washington are on track to start in July. Early fruit sets and plant health look very promising.

### **Citrus**

**Oranges: WATCHLIST ON SMALL SIZES** Quality on Navels remains very good with good demand as the end of the season for Navels is approaching. Small sizes remain short in supply and will be light in volume for the balance of the Navel season. Pricing on 88's and smaller continues to strengthen as the size structure is now trending heavier to larger sizes with the crop finishing in late June or early July. Ample lead time will be necessary to place orders, especially on small sizes, with many shippers now holding to averages. Valencia season has started. Early projections are for overall volume on the Valencia crop to be lighter in volume this year, with the early fruit being smaller in size with larger sizes increasing as we move through the summer months.

**Lemons: WATCHLIST ON SMALL SIZES** We continue to see very good quality out of California with most shippers. 165's and smaller will continue to be in extremely light supply for the next several weeks, while mid-to-larger sizes, 140's and larger will be available with the market continuing to strengthen on smaller sizes. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

**Limes: ESCALATED ON SMALL SIZES & EXTREME ON LARGE SIZES** Extreme shortages continue on large sizes (110's, 150's and 175's) as the high temperatures and lack of rain in the growing areas have accelerated fruit maturation, leading to the prevalence of smaller-sized limes (200's, 230's and 250's). The market remains elevated on large sizes and is expected to remain elevated for the next several weeks with increasing concern about fruit quality.

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

### **West Coast Lettuce**

**Iceberg: WATCHLIST** Lettuce supplies and quality are good, but we are still seeing Sclero and INSV creeping into some fields. This will cause some growers to have decreased supplies. We expect to see the market firm up because of this.

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

**Romaine & Romaine Hearts: WATCHLIST** Romaine and Romaine heart quality and supplies are good. There have been some reports of fringe burns and light cupping. Insect pressure could become an issue as we get into Spring weather. We have also had some initial reports of small amounts of INSV and sclerotinia in some of the romaine fields. We are adding this to the watchlist as we monitor that situation. The market is starting to trend a bit higher.

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

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

**Eastern and Western Vegetables:**

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**Green Bell Pepper:** Season is done in Nogales and shifting to McAllen. Locally, South Georgia is now in full swing; Coachella also has good volume. Quality is good in all markets.

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

**Mini Sweet Pepper:** Supply stable this week loading in Coachella and Florida.

**Mixed Chili Pepper: ESCALATED** Supplies in general are good across most varieties out of Mexico, but quality is mixed. We should scratch new fields in Sonora over the coming weeks which will improve supply and quality. Jalapeño and Poblano were lighter this week. Habanero, Tomatillo and Shishito will be the shortest and could see some supply interruptions. California should start production in early June and South Georgia over the next 7 to 10 days.

**Eggplant:** Domestic supply is ramping up out of the desert, and quality is outstanding. South Georgia expected to scratch next week.

**Slicer Cucumbers:** Stable supply crossing through Olay and McAllen. Florida is done and we have completely transitioned to South Georgia. Quality is very good in all shipping points

**English Cucumbers:** Good supply available this week crossing from Mexico. Quality on new crop out of Mexico was 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. 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** Guatemalan production continues to show improvement, with gradual recovery in overall volume and consistency. Meanwhile, Mexico is providing a steady supply of French beans, supporting current demand across markets.

**Zucchini/Yellow Squash:** Good volume available in South Georgia. In the west we are wrapping up the Sonora season and will transition to Baja as well as California. Quality is good.

**Herbs: WATCHLIST** Out of the East, Basil quality continues to suffer because of rain in Colombia. Imported chervil supply is just about non-existent due to weather in Ecuador. Meanwhile, out of the West, basil supply and quality are steadily improving. Supply on all other herbs remains stable.

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



Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

**Melons:** Offshore season is done, and we are in full transition to the desert.

**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. Jumbo fruit still has not made an appearance as of yet, but we will likely start to see those once the next block of fields break by early next week. Field reports show excellent quality from the desert. Fruit is strong externally with very good color and internal brix levels mostly in the 13-15% range consistently.

**Honeydew:** Honeydew production has started off strong and is coming in with an excellent mix of 5s and 6s. Similar to the cantaloupe, no jumbo fruit has been seen yet, but those will be right around the corner as well. The domestic dewes 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 dewes are mostly in the 12-14% range.

**Watermelon:** Watermelon volume is very good out of Mexico 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 continues with low volume due to weather. Peruvian volume remains unchanged. Michigan continues with cooler weather which has slowed production. Markets are a little more active on larger sizes.

**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 is good, but supplies are light with some growers. You will likely see some growers holding to averages over the next few weeks.

**Brussels Sprouts: ESCALATED** Quality and supplies are improving. Seeder and sizing still lean towards medium and smalls. Jumbos continue to be limited. Insect injury and elongated core are some of the main obstacles. The market has eased up a bit and is no longer at the extreme level but is still escalated. The market is trending down.

**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 Coachella and Brawley has started while volume remains steady out of Florida with Georgia on the horizon. Quality is good in all locations.

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

**Kale: Supplies** have improved, and quality is good.

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

**Garlic:** The 2024-2025 California Garlic season is 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. Starting the week of May 19<sup>th</sup>, we will see growers supplementing with product from Mexico to Bridge the Gap until new crop California Garlic gets started the first week of August. Quality will remain very good through this transition.

**Ginger:** Supplies and market are steady.

**Green Cabbage:** Supplies and quality look good.

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

**Mushrooms:** Promotable volume available and quality is good.

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

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

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

**Red Cabbage: WATCHLIST** Quality 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 of Guatemalan snow peas and sugar snap peas is currently down due to a lack of rainfall in the growing regions. Additionally, elevated humidity levels may contribute to quality concerns in upcoming shipments. Elsewhere, Mexican production for both snow peas and sugar snaps remains steady, offering a more reliable supply option 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, 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:** Light volume out of Palmetto, Wimauma and Wachala; these regions will wrap up this week and transition to Bainbridge and parts of South 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. Tennessee expected to scratch mid to late June.

**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. Markets are firm and demand higher on larger fruit. Seems the size curve is spreading out on the crop. Quality is outstanding on new crop while there are still some lingering quality issues with residual winter production.
- **Roma Tomatoes: Snacking Tomatoes (Cherry, Grape and Medley): Steady** supply and light demand have put downward pressure on fob pricing; quality remains good.
- **Tomato on the Vine:** Stable volume available this week.

## **California**

- Forecasted to start scratching this weekend

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

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

**Pomegranate:** Limited availability.

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

**Cherries:** Season is winding down out of California and will start transition to Washington soon.

**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.