



Weekly Market Review March 7, 2025

Overview

President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, will not take effect until April 2nd. With that, we will continue to see strong production out of South Florida on several items, with good quality and availability across multiple commodities. Mixed Hot Peppers, particularly Caribes, were the lightest in supply. Similar availability and quality are observed through Nogales and McAllen. Markets are firmer today on Roma tomatoes, yellow Squash and green bells. We will see this continue as transition in the west from Sinaloa to Sonora ramps up on several spring items. The offshore Table Grape season has improved, with stable supply. Melons have also turned the corner, showing excellent volume and quality out of the ports as well as crossing through Nogales. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible in pineapple sizes. Industry supply remains limited, and the market is tightening as supply stabilizes. Avocado supply is tighter this week due to lighter harvests in Mexico, leading to continued high prices and limited availability. Large fruit remains at a premium, while smaller fruit is being retained in Mexico to meet increased domestic demand for Lent. The market continues to experience a high percentage of grade 2 fruit from Mexico, a trend expected to persist. Meanwhile, California's supply is projected to increase despite recent weather-related reductions in harvest volumes. Overall, industry supply is expected to remain limited, with elevated prices anticipated in the near term. Smaller-sized fruit is expected to dominate the size curve for the remainder of the season, aligning with the adjusted crop volume. An extended rainy season has resulted in a higher proportion of grade 2 fruit, further impacting overall availability. USDA-imposed restrictions at the packhouse continue to limit industry-wide packing capacity, adding pressure to supply. Meanwhile, the U.S. market will face increased competition from Mexico, where domestic demand is rising during Lent (March 5 – April 20). Additionally, tariffs went into effect for Mexican avocados imported into the U.S. on Tuesday, 3/4/25. There are many unknowns in this unprecedented avocado market: we will work with growers and the information at hand to remain ready to pivot as needed to continue offering a secure supply. Unfortunately, the warm weather did not continue in the desert region. We have a cold front that has moved in and will once again give us those chilly mornings. We are also seeing high wind gusts. The combination of those 2 things, along with the potential insect pressure, could cause some issues as we get into March. Overall supplies are looking good, but now we have to keep an eye on the temperatures and see how the cold mornings will once again affect all the commodities. We know that bugs will be a potential issue, especially on Cilantro and Kale, so we will keep a close eye on that. Overall, supplies are looking stable. Broccolini has been added to the alert list since some growers have increased the price due to very limited supplies. Endive, Escarole, Cilantro, and Spinach remain escalated, with supply shortages driving market conditions. Bok Choy, Fennel and Leeks remain at the extreme trigger level. Red Cabbage is still slightly escalated, though overall Cabbage supplies continue to improve. The cool weather could once again cause epidermal peel and frost damage, while the warm weather in the afternoons will likely attract insects. Insects will be something that the fields will battle throughout March. Aphids are likely to target Arugula, Kale and Cilantro so we will be monitoring those items closely. We will keep an eye on those items and all leafy greens and keep everyone updated on any issues.

Market Alert List

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

Watch List

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

Fruits & Vegetables

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

Avocados: ESCALATED Tariffs went into effect for Mexican avocados imported into the US on Tuesday, 3/4/25.

Unfortunately, this has caused a significant increase in overall prices. In this unprecedented avocado market, there are many unknowns; while we work with the information at hand, we remain ready to pivot as needed to continue offering a secure supply. Last week, volume closed at a steady 59M pounds. However, this week is tracking much lighter - harvest is down 25%. Tariffs will certainly result in reduced demand, so coming in under the projected 60M pounds is ideal. Out of California, rain is forecast for late this week & next, which will limit harvest volumes. Volumes are expected to ramp up for week 12 production. The crop estimate remains set at 355M pounds for the season, like last season, which closed at 346M pounds. April will bring larger, more consistent volumes that are expected to last into September. The size curve will favor 48s and smaller for the first few months, with additional larger sizing available in the late season. The dry matter is roughly 33% for Mexican fruit.

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

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

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

Berries

Strawberries: Strawberry production across key growing regions faced varied challenges due to weather conditions contributing to a decline of fruit out of the west. Rainfall in Santa Maria has hindered harvests this week. Growers are seeing quality fruit emerge, though smaller sizes and some water-related damage persist. Production is expected to steadily improve as weather conditions stabilize, with March projected to bring above normal volumes. We will continue to see limited fruit out of the west through the remainder of the week. In Mexico, high temperatures and wide temperature swings are causing uneven ripening, and overall production is in a steady decline as the season nears its end. Smaller growers have already ceased operations, and fruit size is trending smaller. Quality concerns, particularly bruising and soft skin, remain a focus for shipments arriving out of Mexico. Florida has experienced fluctuating temperatures with light rain, but no significant damage has been reported. Cooler weather is expected to slow production in the short term but may improve fruit quality in the long run. Peak production is still anticipated in early March, though there is a risk of rain damage if heavier rainfall occurs. Across all regions, growers remain proactive in managing quality concerns and adjusting harvesting strategies to optimize supply and maintain fruit integrity. In Mexico, high temperatures and fluctuating conditions are causing uneven ripening, and overall production is steadily declining as the season nears its end. Some smaller growers have already ceased operations, and fruit size is trending smaller. Quality concerns, such as bruising and soft skin, remain a key focus for shipments. Additionally, Mexico's supply was impacted by newly imposed tariffs on Tuesday, March 4, further contributing to market constraints and potential pricing fluctuations. This development adds to the existing supply challenges, reinforcing the need for close monitoring of availability and market conditions in the coming weeks. Meanwhile, Florida has experienced fluctuating temperatures and light rain, though no significant damage has been reported. Cooler weather may slow production in the short term but is expected to enhance fruit quality in the long run. Peak production remains on track until early March, though the risk of rain damage remains if heavier rainfall occurs. Across all regions, growers are proactively managing quality concerns and adjusting harvesting strategies to optimize supply and maintain fruit integrity.

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

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

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

Citrus

Oranges: Quality from California remains excellent with very good supplies. Pricing on smaller sizes, 113's and 138's, is firming up as the size structure is switching, but the overall market is stable.

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

Lime: ESCALATED ON SOME SIZES The Lime market is slightly stronger with pricing on some of the smaller sizes escalated. Current demand has increased due to much better weather across the country. We continue to see the presence of oil spots and style-end breakdown from the rains a few weeks ago, which generally appears after repack/sorting while the fruit is in transit. Sizing is running heavier to smaller size, which we expect to see throughout the remainder of Q1 as large sizes will be scarce.

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

West Coast Lettuce

Iceberg: WATCHLIST Lettuce supplies and quality look good. Weights have improved but we are already seeing some premature pinking with the stress of the new hot temperatures. We have also had some reports of internal burn. Iceberg VA: Quality and supplies look good.

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

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

Eastern and Western Vegetables:

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

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

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

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

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

Slicer Cucumbers: Good supply crossing through Nogales and McAllen as well as Honduras. Quality is good.

English Cucumbers: Good supply available this week crossing from Mexico. Quality on new crop out of Mexico was good.

Pickles: Lighter supply available crossing through Nogales. Quality is outstanding.

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

French Beans: Watchlist As growers continue to face vessel delays, shortages of certain pack sizes are expected. While quality and condition vary, they remain generally good. Prices remain stable with no significant changes at this time. In Mexico, supply is limited due to adverse weather conditions, impacting overall availability.

Zucchini/Yellow Squash: WATCHLIST Good volume and quality available shipping from all locations on Italian; markets are shorter on yellow.

Herbs: ESCALATED

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

Melons

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

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

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

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

Mixed Vegetables

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Artichokes: Supplies and Quality are both good.

Asparagus: ESCALATED Mexican production remains strong, as the Peruvian season has now concluded, and reporting has ceased. However, with new tariffs now in place, prices are expected to rise. Quality remains high, with consistent sizing, particularly in large and jumbo fruit.

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

Broccoli/Broccoli Crowns: Quality and supplies look good. Floret Mini's are still tight, and some growers are still short on those.

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

Brussels Sprouts: Quality and supplies look good.

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

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

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

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

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

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

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

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

Ginger: Supplies and markets are steady.

Green Cabbage: WATCHLIST Supplies, and quality looks good.

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

Mushrooms: Supply is stable, 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 escalating in some markets. The quality is good but supplies are still light with some growers. The market remains very active.

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

Snow Peas and Sugar Snaps: Supplies from Guatemala remain strong and steady, though vessel delays may impact availability. Prices have decreased, reflecting current market conditions. Snows and Sugar snaps Mexican production is steady.

Onions:

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

Potatoes:

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

Tomatoes:

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East Coast

- Round Tomatoes: Harvesting is now in full swing but may slow as a cooler weather pattern remains in place this week. We do expect to see markets remain stable. Quality is excellent.
- Romas Tomatoes: Harvesting is now in full swing but may slow as a cooler weather pattern remains in place this week. We do expect to see markets firm up a touch this week. Quality is excellent.
- Snacking Tomatoes (Cherry, Grape and Medley): Lighter supply and higher demand has put upward pressure on fob pricing this week. The quality remains good.

Mexico

- Round Tomatoes: Harvesting is now in full swing but may slow as a cooler weather pattern remains in place this week. We do expect to see markets remain stable. Quality is excellent.
- Romas Tomatoes: Harvesting is now in full swing but may slow as a cooler weather pattern remains in place this week. We do expect to see markets firm up a touch this week. Quality is excellent
- Tomato on the Vine: Steady volume available this week.

Other Fruit:

Apples: Last year, Washington State Apple growers shipped just over 136 million boxes of Apples. This year's total is projected at 124 million. Prices will likely be higher this year and much more manageable of a crop.

Projections below

- Red Delicious – 4 million down from last Season
- Gold Delicious – 280,000 boxes down from last Season
- Gr Smiths – 1.1 million boxes down
- Fuji – 1.5 million boxes down
- Gala – 3 million boxes down
- Honeycrisp – 5 million boxes down
- Cosmic – Up 2.7 million boxes
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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.
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Pomegranate: Limited availability.

Asian Pears: Peaking in volume. Quality is outstanding.

Cherries: Offshore supplies are steady loading out of Philadelphia.

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.

Persimmons: Active markets and quality are good on both Hachiya and Fuyu.

Quince: Limited supply available this week.