



Weekly Market Review April 11, 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 breaks new fields and Mexico starts new regions in Sonora and Baja. Quality is outstanding in all markets. The lighter items in supply are Yellow Squash, 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. 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. Avocado market conditions remain strong, though this week's harvest volumes are lighter than anticipated. With Holy Week approaching, harvest activity is expected to be limited to the first half of next week, resulting in reduced fruit availability and rising field prices. Demand continues to be high, particularly for small and medium fruit, as the industry works to build inventory ahead of Cinco de Mayo promotions. A significant portion of small fruit remains in the Mexican domestic market to meet seasonal demand related to Lent and Easter. The industry is still seeing a high percentage of Grade 2 fruit from Mexico, a trend that is expected to persist. Meanwhile, California is now harvesting at stronger volumes, providing some support to overall supply needs. Prices remain elevated across all grades and sizes, but increased volume from Colombia and Peru projected for May and June is expected to alleviate pricing pressure and bring greater market stability. Transition is still in full swing, and we have growers in Huron, Oxnard, and Salinas. Some are still in Yuma, but the majority have already made the move to Salinas. The growers that are not currently in Salinas will be making the move next week. It is always a hectic time, but the growers are 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 is looking good for the upcoming week. 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, Cilantro and Parsley remain escalated, with supply shortages driving the market. Fennel is no longer at the extreme trigger but is still escalated. Spinach and Red Cabbage are both finally off escalation, but we will add those 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. 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 will be hopeful that the next few weeks keep that trend going!

Market Alert List

- **Asparagus – ESCALATED**
- **Avocados – ESCALATED**
- **Bok Choy – EXTREME**
- **Cilantro – ESCALATED**
- **Endive and Escarole – ESCALATED**
- **Fennel, Anise – 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. **Cabbage, Green**
6. **Cabbage, Red**
7. **Cauliflower**
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. **Spinach**
16. **Squash, Yellow**
17. **Eggplant**

Fruits & Vegetables

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Avocados: ESCALATED *The avocado industry experienced a significant decline in volume, closing at 48M pounds, representing a 37% drop overall, with Mexico down 46% compared to the previous week. This slowdown deviated from original projections of 64M pounds and was driven primarily by tariff uncertainties last week. The current availability is heavily weighted toward smaller fruit, with 48s and larger in tighter supply. The industry continues to see a high percentage of Grade 2 fruit, a trend expected to increase as the season progresses. The Main Crop now holds a dry matter estimate of 34.5%. USDA-imposed restrictions on packhouse production hours remain in place across the industry, limiting packhouse capacity and contributing to overall supply constraints. In California, approximately 10.7 million pounds were harvested in week 14, with dry matter averaging 25%. Sizing is currently peaking on 48s and 60s. While early-week harvests were limited due to wet field conditions, the industry anticipates weekly increases in harvest volumes as we approach the Cinco de Mayo promotional period.*

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 4 weeks.*

Berries

Strawberries: *Supplies continue to increase as California has seen warmer temperatures and good overall quality. Production is now completely out of the west as Florida is finished for the season. Green fruit sets are strong, and production is expected to increase significantly as harvest crews move to piece-rate picking. The region is on track to reach peak production between mid-April and early May, with later-planted blocks continuing into June. In Oxnard, volume is expected to ramp up steadily as favorable weather conditions support a flush of supply. The region is on track to peak in late April. Similarly, Salinas/Watsonville is projected to see increasing volume in the coming weeks, with no further disruptive weather currently in the forecast, allowing for more consistent production.*

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: We anticipate continued high volume over the next few weeks, with Mexico currently at peak conventional production through mid-April before gradually declining into May. Weather conditions in Mexico remain hot, with daytime temperatures in the 80s to 90s and cooler nights in the 50s supporting strong output. Quality remains excellent overall, with good flavor, bloom, and appearance, though some isolated issues include redberries, soft/leaking fruit, and shriveling. Production is currently at peak levels in Florida but is expected to wind down over the coming weeks. Early cooler weather and rain delayed the start of harvest and pushed peak production back by one to two weeks. A sharp decline is expected in May as the season wraps up.

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.

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 Demand is steady as size continues to peak in smaller sizes, including 200's, 230's, and 250's, with large size fruit limited. Quality and condition are better. The market is steady, steady on large sizes and slightly weaker in small sizes.

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.

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

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.

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 May 19 th.

Cantaloupe: Quality is excellent and fruit shelf life is strong with extended shelf life and high shell color. Brix levels are held 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 it a bit more scary 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 produce 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 a rising volume.

Mixed Vegetables

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Artichokes: Quality and Supply are good.

Asparagus: ESCALATED Caborca and San Luis volumes remain low due to ongoing weather challenges and seasonal decline. Meanwhile, Peru has begun shipping containers, with the first arrivals landing last week. Improved volume is expected after Easter, which should help alleviate some of the current supply pressure. Markets remain very active, driven by reduced volume out of Mexico, and are expected to stay 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.

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 out with the remaining crops in Yuma, but we could see that change as everyone made their way into Salinas.*

Celery: *Quality and supplies are looking good.*

Corn, Sweet: *Seeing lighter supply out of Mexico and steady volume continues out of Florida. Volume ramping up out of Coachella. 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 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 on 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 products 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 expected to have a lot of products. 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 period, so the market has a good of a chance of improving as it does stay 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 like 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.

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 of 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.