



Weekly Market Review May 2, 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.

We will continue to see strong production out of South Florida on several items, with good quality and availability across multiple commodities with similar conditions being observed in Nogales and McAllen. Stable volume seen across the entire tomato category as Florida is harvesting new fields as well as Mexico harvesting new regions in Sonora and Baja. Quality is outstanding in all markets. We expect to see tomatoes start in California early June. The lighter items in supply are green beans, premium sized green bells, pickles, shishitos, habanero, and caribe peppers. We will start to see our first transitions of the season in the west on mixed vegetables; growers will begin harvesting a few peppers, corn and beans picked out of Coachella over the next week. The offshore table grape quality and supply are stable; Mexico is forecasted to start over the next 7 to 10 days. Offshore melons are on the backside of the season and volume will steadily decrease over the coming weeks; transition to desert fruit will start in 3 weeks. Banana and pineapple availability remains limited; shippers are asking we continue to be flexible on pineapple sizes. Cinco de Mayo, the second-largest avocado consumption event of the year, proved underwhelming in 2025, with market pricing beginning to decline. The shift is largely driven by increased country-of-origin (COO) diversification, which is diminishing Mexico's market dominance. Mexico's share dropped to 69% last week, and that number is expected to decline as Peruvian volumes build weekly, targeting a July peak. California is peaking on 48s, Colombia on 70s, and Peru is bringing in larger fruit, offering buyers a wider size range. Unfortunately for Mexico, this shift comes just as the 60ct size—its strongest size curve since week 8—takes center stage. Market stability appears to be on the horizon, with the post-Cinco adjustment likely to be the final volatility of the spring. The Off-Bloom Crop (Loca/Mendez) is on track for a traditional July 1st start, with Jalisco's Mendez 2025–2026 crop forecasted up 7.8% year-over-year. The Michoacán Loca crop estimate is expected in the coming weeks. The 2025 Peruvian season is preparing for global shipments, with initial U.S. program arrivals projected for late May to early June. Size and quality have been strong, and promotional activity is expected throughout the summer. Meanwhile, Colombia's Travesía crop is well underway, supplying both U.S. and European markets. Volume looks promising, particularly on medium and small fruit, supporting promotional opportunities as the season reaches its peak. Spring is here and the Salinas season has officially kicked off. Transition went well this year, and we are grateful to all the growers for all their hard work during this time. The weather has been nice Spring weather and while there was some rain, there doesn't seem to be any adverse effects from it. Spring does bring rain, which will cause some insect pressure. We will keep an eye on that and report any issues, but for now, there have been no major reports. Lettuce looks good and while we have seen some lighter weights and some smaller heads, quality and

supplies are good and should continue to improve as everyone settles into Salinas. Brussel Sprouts continues to be an issue. You can expect to see light supplies and possible shortages for at least the next 2 weeks. Quality is also now an issue. Jumbos are very limited, and sizing is leaning more towards small and medium. Growers are navigating this the best they can and should see some relief as we get into May, but for now, the market is escalated and will continue to rise until the supplies improve. Endive, escarole, fennel and parsley remain escalated, with supply shortages driving the market. Bok choy, napa, and leeks remain at the extreme trigger level. Overall production in Salinas is steady, and we are hopeful for a great season.

Market Alert List

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

Watch List

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

Fruits & Vegetables

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Avocados: ESCALATED The U.S. avocado industry closed last week at 63.6M pounds, a 21% increase from the prior week. While projections called for 70.5M pounds post-Holy Week, actual volumes fell short. Despite this, inventory levels are higher this week as the industry prepares for Cinco de Mayo promotions. Demand remains strong for small fruit, with pricing holding steady. Market conditions and availability have improved for medium and large sizes, supported by consistent supply from Mexico and California. Mexico continues to produce a high percentage of Grade 2 fruit, a trend expected to persist. In contrast, California is delivering strong volumes with excellent quality. The 2025 Peruvian season has begun, with production ramping up to meet anticipated summer demand in June. Current dry matter content averages 35.2% for Mexico's Main Crop and 26% for California.

Bananas: ESCALATED: Banana imports remain extremely light for the 4 weeks. We continue to see record demand and light supply due to cooler and poorer-than-desired weather in the tropics as well as logistic challenges impacting the global supply over the past three weeks. We could see minor pro-rates across the network over the next four weeks. Overall, banana quality has been good despite being in the winter cycle. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to store fruit in warmer locations or wrap fruit. With inventories being light, we see higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival.

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

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

Berries

Strawberries: Supplies are light this week, impacted by cooler temperatures and weekend rainfall, with lower volumes expected to persist through next week. In Santa Maria, green fruit sets remain strong, and production is expected to ramp up significantly once temperatures rise, and harvest crews shift to piece-rate picking. The region has fallen slightly behind schedule, with peak production now forecasted for the second week of May, and later-planted blocks likely extending into June. In Oxnard, volume is building steadily, driven by favorable weather conditions that are prompting a flush in supply. We have passed the brief peak production, and we see a rapid decline as growers begin to transition to the Salinas/Watsonville region. Salinas/Watsonville is projected to gradually increase production in the coming weeks, with more consistent volumes expected by mid-May.

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: ESCALATED Overall volumes increased modestly this week, with substantial volume gains expected by mid-May. Georgia volumes are beginning to increase, signaling that the industry has likely moved past the seasonal low; however, meaningful improvements are not expected until mid-to-late May. The season in Georgia was delayed by several weeks due to early-season weather challenges, but volume growth is anticipated to continue into next week. Mexican supplies continue declining faster than expected, and Florida volumes remain limited due to ongoing quality issues. In California's Central Valley, production is also behind schedule, with only light harvest activity starting this week. More significant volumes are projected by mid-May.

Citrus

Oranges: Fruit quality remains excellent and offers great eating quality. Pricing on 88's and smaller, primarily 113's and 138's, continues to strengthen as the size structure is now trending from heavier to larger sizes. Ample lead time will be necessary to place orders, especially in small sizes, with many shippers now holding to averages.

Lemons: We continue to see very good quality out of all growing areas in California. Most shippers are reporting small sizes, 165's and smaller, becoming extremely light in supplies and will continue for the next 4 to 6 weeks, while mid-to-larger sizes, 140's and larger, remain readily available. The market is stronger on smaller sizes. Ample lead time will be necessary to place orders, especially on small sizes, with many shippers now holding to averages.

Limes: ESCALATED Available supplies remain light this week and are expected to stay limited until next week. Shippers are currently catching up from reduced availability during Holy Week. Looking ahead, overall supply will remain tight while demand increases for Cinco de Mayo and as a result, expect the market to trend higher. In addition, sizing continues to peak on smaller fruit—primarily 200s, 230s, and 250s—while larger sizes remain limited. We anticipate the strong market to continue for at least the next few weeks, especially leading up to the Cinco de Mayo holiday.

Imports/Specialties: Blood Oranges are still being packed but will be finishing for the season between the middle to end of May. Sizing is running small. Cara's are also available and will be finishing Mid-to end of May. California Mandarins are in good supply with very good quality. California Grapefruit is available with light supplies on Fancy grade; choice grade are readily available.

West Coast Lettuce

Iceberg: WATCHLIST: Lettuce supplies are good. You can still expect lighter weights and smaller heads from some growers until everyone is settled into Salinas, but overall quality is good. **Iceberg VA:** Quality and supplies look good

Romaine & Romaine Hearts: WATCHLIST Romaine and Romaine heart supplies are good. Insect pressure and light blistering have been reported. **Romaine VA:** Quality and supplies are good

Green Leaf and Red Leaf WATCHLIST: Overall quality and supplies look good. Weights and size are improving.

Eastern and Western Vegetables:

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Green Bell Pepper: Seeing short supply in Nogales, particularly in large sizes. Coachella is now in full production with a good supply of all sizes with larger sizes catching a premium. South Florida is still seeing higher prices on premium sizing while choice fruit is plentiful; we should transition to South Georgia around the 10th of May.

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 as well as South Georgia by 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. We should scratch new fields in Sonora over the coming weeks which will improve supply and quality. Jalapeño and Poblano were good this week. Caribes, Habanero and Shishito were shorter this week. California should start production in early June and South Georgia by the 2 nd week of May.

Eggplant: Lighter domestic supply continues, and quality is mixed. Good supply and excellent quality out of Mexico this week. South Georgia and California should start the 3rd week of May.

Slicer Cucumbers: Lighter supply crossing through Nogales and McAllen as well as Honduras. We are seeing tighter supply 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. South Georgia is expected to start May 10th.

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

French Beans: WATCHLIST Production in Guatemala remains limited due to a continued lack of rainfall, and vessel delays are further impacting shelf life. As a result, supply will remain extremely low through the end of the week. In contrast, there is a strong supply of French beans out of Mexico, helping to offset some of the regional shortfalls.

Zucchini/Yellow Squash: Good volume and quality available shipping from all locations on Italian and Yellow from Mexico and Florida. Georgia started with strong volume on all sizes earlier this week; California is still a few weeks out.

Herbs: ESCALATED In the eastern regions, basil quality remains challenged due to ongoing rain in Colombia, though supply and quality are gradually improving, albeit slower than anticipated. Imported chervil volume is limited as adverse weather in Ecuador continues to impact production. Out of the western regions, supply and quality remain steady and are improving, but slower than expected. Both should continue improving as the weather improves.

Melons:

Stronger retail demand and delayed vessels have quickly shortened the cantaloupe market. FOB pricing remains firm this week. We do expect transition from our offshore program to the desert on May 19th. Volume is going to decrease daily on offshore fruit with limited availability on open market sales.

Cantaloupe: Quality is excellent and fruit shelf life is strong with extended shelf life and high shell color. Brix levels are holding mostly in the 14-16% range that has been seen in recent weeks; sizing profile will shift to more 9 and 12's with 15's continuing to be limited.

Honeydew: Honeydew production will drop off this week with sizing still strong leaning to 5s-5Js; 6ct has been extremely limited. We are seeing a bit more scar, but overall quality has been solid. Brix levels are mostly in the 12-14% range. We may see a bit more Mexican fruit available in the market

Watermelon: Watermelon supplies are lighter, and demand is strong out of Mexico and Florida. Smaller sizes will remain tight, and new fields are producing larger fruit. Prices are expected to stay strong on binds and cartons. There are some deals available on 11ct minis.

Mixed Vegetables

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Artichokes: Quality and Supply are good.

Asparagus: ESCALATED Production in Caborca and San Luis has concluded for the season, while Baja has begun harvesting, though current volumes remain low. Peruvian supply continues to build weekly, contributing to less active market conditions as overall availability increases. However, white asparagus volume out of Peru is beginning to decline due to seasonal shifts and ongoing field transitions.

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

Broccoli/Broccoli Crowns: WATCHLIST Quality is good. Demand seems to be exceeding supplies. The industry is a bit tight, and the market is rising a bit, but it will likely be short lived.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality looks good, and most growers are looking good on supplies.

Brussels Sprouts: EXTREME Quality and supplies are an issue with the majority of growers right now. The industry supply has dropped significantly. You can expect to see shortages and for the market to rise. Growers are trying to cover 10-week averages. Seeder and size lean towards medium and smalls. Jumbos are very limited. The market is at an extreme level.

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 Quality is good, and supplies are okay. Growers seem to be a bit light, but demand is not high.

Celery: WATCHLIST Quality and supplies look good. The Organic Market is increased.

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

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

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

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

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

Ginger: Supplies and 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.

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 snow pea and sugar snap production remains stable; however, quality concerns may arise due to persistent humidity in the growing regions. In Mexico, production of both snow peas and sugar snaps continues at a steady pace.

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 also 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 time period, so the market has as 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 similar to the current year. Given the depressed market conditions this season, there is some concern about similar supply levels next year, particularly if yields remain consistent.

Tomatoes:

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East Coast

- **Round and Roma Tomatoes: Florida** is peaking on production of rounds; romas were lighter in volume this week and markets were higher. 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 smaller sizes, larger sized fruit was tighter this week; Quality is outstanding out of the newer regions. Quality from Sinaloa is hit and miss. Baja will be scratching this week.
- **Roma Tomatoes:** Ample supply from Sonora and Sinaloa are crossing through Nogales and McAllen. Quality is good out of Sonora and Jalisco. Sinaloa was fair at best. We are seeing some light crossings on romas from Baja this week.
- **Snacking Tomatoes (Cherry, Grape and Medley):** Steady supply and light demand have put downward pressure on fob pricing, quality remains good.
- **Tomato on the Vine:** Stable Volume available this week.

California

- Forecasted to start in early June.

Other Fruit:

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

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

- **The Bartlett Crop** out of the Northwest shows 3.8 million shipped last season vs a projected 2.9 million this year for a 14% decrease. It's not substantial in terms of overall volume, but it's still a factor. The cold temperatures will affect the grade, so more Fancy's will be packed than normal. Because the crop is smaller, the size profile has increased by 1 to 2 sizes. Barts to finish by the end of February/beginning of March.
- **Anjous** report at least a 30% total decrease, or 1.85 million boxes less than last year. Also, out of the Wenatchee Valley, there will be more fancy and, for the first time in many years, a 3rd grade Anjous packed. When we start to pack Anjous– this will be your value pear. Anjous to start the week of September 16th, and if growers make it through June, I will be surprised.
- **Red Anjous** are down 7% or 47,000 boxes, so it is nothing dramatic like the others. The question on Red Anjous is whether or not we will see smaller pears such as 120/135 cts. Red pears are supposed to be 1 to 2 sizes larger out of the PNW. Red pears have started with
- **Starkrimsons** and will transition into Red Anjou from November through May.
- **Bosc** are down 63% out of the great Northwest, or 1.38 million boxes. This variety was mostly affected, and markets will be much higher than in previous years. Bosc has slowly started with a potential end date last January/middle of February.

Pomegranate: Limited availability.

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

Cherries: Limited Supply Available.

Tree Fruit: Offshore Peaches, Plums and Nectarines in limited supply.

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

Quince: Limited supply available this week.