



**Overview**

We will continue to see “demand exceeds supply” conditions on Tomatoes this week, with conditions in Florida being the tightest of the season due to the freeze event. Expect deep prorates and broader quality issues. We do *not* anticipate improvement for another 2-3 weeks and highly recommend flexibility as Rounds will be almost non-existent with varying sizes available. Conditions will remain fluid day to day; we recommend subbing to Romas and scaling back portions or removing items from menus where possible. Hot Peppers remain in very tight supply across all categories. The Lime market will start to ease back as more volume crossed the border with peak sizing on small fruit. 175’s and larger will be short with substitutions to smaller sizes necessary for the next several weeks.

Transition is complete and we are experiencing high markets and shortages on multiple items. Rain and cooler weather are still in the forecast, which has slowed growth patterns. Harvesting is being affected by the rain. These factors will limit supplies. Demand exceeds supply for many commodities. Broccoli, Broccolini, Cauliflower, and Lettuce have very limited supplies and are the extreme trigger. Prorates should be expected. Romaine/Romaine Hearts, and Celery remain escalated due to limited supply and quality concerns. Carrots continue to face ongoing supply challenges, with full recovery not expected until May. Artichokes, Celery, Bok Choy, and Napa remain extremely limited and escalated. Growers anticipate that the weather conditions will create quality and supply issues as well as loading delays.

Table Grape supply is steady, with Red Grapes readily available and Green Grapes tighter. Lime availability is expected to decrease due to reduced volume out of Veracruz, Mexico, leading to higher markets and decreased availability across all sizes. Efforts are underway to secure alternative supplies from Colombia. Banana supplies are expected to tighten due to strong global demand and virus-related pressures.

Cantaloupes have another week of steady production before the offshore season starts to wind down. Honeydew saw an increase of product from Mexico and the market has settled. Pineapple availability has tightened up, and we recommend having size flexibility. Avocados from Mexico had another big harvest as we get ready for Cinco de Mayo. Berry markets are mixed, with overall supplies pressured in the near term by recent rainfall impacting production and quality in key growing regions, though conditions are expected to improve as fields recover. Supply is building in several areas, with strong production and generally stable quality, despite some heat-related pressure on fruit condition. Over the coming weeks, expect improving availability and better consistency as multiple regions reach peak production, with markets stabilizing into May.

Citrus markets are experiencing tight supplies on smaller sizes across many varieties, including Lemons, Navels, Cara-Caras, Minneolas (ending in May, some suppliers are finished already), and Blood Oranges, with fruit generally trending large. Domestic Meyer Lemons are available, and California Valencia’s are expected in late April/early May. Mandarin availability is mixed, and Grapefruit supplies are available. Please begin considering imports for this summer. They will offer relief on strained sizing- especially for people on the east coast.

Freight: Limited trucks and record high fuel costs are putting upward pressure on rates daily. We are seeing several freight companies, including sea freight companies, invoking fuel surcharges which will impact cost inputs.









**Alert List**

- Asparagus – **EXTREME**
- Artichokes – **ESCALATED**
- Bok Choy – **EXTREME**
- Boston/Butter Lettuce – **ESCALATED**
- Broccoli – **EXTREME**
- Broccoli Crowns Asian Cut – **EXTREME**
- Carrots – **EXTREME**
- Cauliflower – **EXTREME**
- Celery – **EXTREME**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Green Leaf/Red Leaf Lettuce – **ESCALATED**
- Green Onions – **ESCALATED**
- Honeydews – **ESCALATED**
- Hot Pepper: All Varieties – **ESCALATED**
- Lettuce – **EXTREME**
- Limes – **EXTREME**
- Napa – **EXTREME**
- Parsley Italian – **ESCALATED**
- Raspberries – **EXTREME**
- Romaine – **ESCALATED**
- Romaine Hearts – **EXTREME**
- Sweet Corn – **ESCALATED**
- Table Grapes – **ESCALATED**
- Tomatoes (Rounds and Roma Tomatoes)
  - Mexico and Florida – **EXTREME/ACT OF GOD**
- Warm Veg Category: Corn and Eggplant – **ESCALATED**
- White Asparagus – **ESCALATED**









**Watch List**

1. Blackberries
2. Broccolini
3. Cabbage, Red
4. Cabbage, Green
5. Herbs
6. Pineapple
7. Ginger
8. Cantaloupe
9. Small Citrus Sizes across all Varieties
10. Sugar Snap and Snow Peas









**Weather**  
**SALINAS, CA**

| Thu 4/23  | Fri 4/24  | Sat 4/25  | Sun 4/26  | Mon 4/27  | Tue 4/28  | Wed 4/29  | Thu 4/30  |
|---|---|---|---|---|---|---|---|
| 68°   49°F  | 64°   51°F  | 60°   49°F  | 64°   46°F  | 65°   47°F  | 66°   49°F  | 67°   49°F  | 69°   50°F  |
|  |  |  |  |  |  |  |  |
| Mostly Sunny  | AM Clouds/PM Sun  | Cloudy  | Mostly Cloudy   | Partly Cloudy   | Mostly Cloudy   | Partly Cloudy   | Partly Cloudy   |









**YUMA, AZ**

| Thu 4/23  | Fri 4/24  | Sat 4/25  | Sun 4/26  | Mon 4/27  | Tue 4/28  | Wed 4/29  | Thu 4/30  |
|---|---|---|---|---|---|---|---|
| 87°   59°F  | 91°   65°F  | 85°   61°F  | 81°   57°F  | 84°   59°F  | 88°   62°F  | 85°   63°F  | 90°   65°F  |
|  |  |  |  |  |  |  |  |
| Partly Cloudy   | Partly Cloudy   | AM Clouds/PM Sun  | Sunny   | Sunny   | Partly Cloudy   | Sunny   | Sunny   |









**OXNARD, CA**

| Thu 4/23  | Fri 4/24  | Sat 4/25  | Sun 4/26  | Mon 4/27  | Tue 4/28  | Wed 4/29  | Thu 4/30  |
|---|---|---|---|---|---|---|---|
| 70°   53°F  | 68°   52°F  | 62°   52°F  | 64°   50°F  | 66°   52°F  | 66°   53°F  | 66°   53°F  | 68°   54°F  |
|  |  |  |  |  |  |  |  |
| Partly Cloudy   | Mostly Cloudy   | Cloudy  | Mostly Sunny  | Mostly Cloudy   | Cloudy  | Partly Cloudy   | Mostly Sunny  |









**CULIACAN, SINALOA**

| Thu 4/23  | Fri 4/24  | Sat 4/25  | Sun 4/26  | Mon 4/27  | Tue 4/28  | Wed 4/29  | Thu 4/30  |
|---|---|---|---|---|---|---|---|
| 97°   65°F  | 98°   63°F  | 98°   64°F  | 97°   66°F  | 98°   68°F  | 100°   68°F   | 100°   68°F   | 100°   65°F   |
|  |  |  |  |  |  |  |  |
| Partly Cloudy   | Sunny   | Partly Cloudy   | Mostly Cloudy   | Cloudy  | Mostly Cloudy   | Partly Cloudy   | Partly Cloudy   |









**HERMOSILLO, SONORA**

| Thu 4/23  | Fri 4/24  | Sat 4/25  | Sun 4/26  | Mon 4/27  | Tue 4/28  | Wed 4/29  | Thu 4/30  |
|---|---|---|---|---|---|---|---|
| 95°   60°F  | 96°   63°F  | 94°   65°F  | 92°   62°F  | 94°   65°F  | 92°   71°F  | 92°   67°F  | 95°   65°F  |
|  |  |  |  |  |  |  |  |
| Partly Cloudy   | Sunny   | Partly Cloudy   | Sunny   | Partly Cloudy   | Cloudy  | Partly Cloudy   | Mostly Sunny  |









**JALISCO, NAYARIT**

| Thu 4/23  | Fri 4/24  | Sat 4/25  | Sun 4/26  | Mon 4/27  | Tue 4/28  | Wed 4/29  | Thu 4/30  |
|---|---|---|---|---|---|---|---|
| 85°   57°F  | 85°   56°F  | 85°   56°F  | 84°   58°F  | 87°   60°F  | 88°   60°F  | 88°   62°F  | 87°   62°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Sunny   | Mostly Sunny  | Mostly Sunny  | Partly Cloudy   | Partly Cloudy   | Partly Cloudy   | Partly Cloudy   |









**VIZCAINO, BAJA SUR**

| Thu 4/23  | Fri 4/24  | Sat 4/25  | Sun 4/26  | Mon 4/27  | Tue 4/28  | Wed 4/29  | Thu 4/30  |
|---|---|---|---|---|---|---|---|
| 96°   63°F  | 97°   63°F  | 96°   64°F  | 95°   66°F  | 98°   67°F  | 98°   66°F  | 97°   67°F  | 99°   66°F  |
|  |  |  |  |  |  |  |  |
| Mostly Sunny  | Sunny   | Mostly Sunny  | Partly Cloudy   | Partly Cloudy   | Partly Cloudy   | Partly Cloudy   | Partly Cloudy   |

**PLANT CITY, FL**

| Thu 4/23  | Fri 4/24   | Sat 4/25   | Sun 4/26   | Mon 4/27   | Tue 4/28   | Wed 4/29   | Thu 4/30   |
|---|--|--|--|--|--|--|--|
| 84°   61°F  | 86°   62°F   | 88°   64°F   | 88°   65°F   | 89°   66°F   | 90°   67°F   | 90°   67°F   | 90°   68°F   |
| <br>Mostly Sunny | <br>Partly Cloudy | <br>PM<br>Thunderstorms | <br>Partly Cloudy | <br>Partly Cloudy | <br>Mostly Sunny | <br>Partly Cloudy | <br>Partly Cloudy |

**LAKE PARK, GA**

| Thu 4/23  | Fri 4/24  | Sat 4/25   | Sun 4/26   | Mon 4/27   | Tue 4/28  | Wed 4/29   | Thu 4/30   |
|---|---|--|--|--|---|--|--|
| 85°   56°F  | 86°   58°F  | 85°   62°F   | 87°   63°F   | 87°   63°F   | 88°   64°F  | 87°   64°F   | 87°   66°F   |
| <br>Mostly Sunny | <br>Mostly Sunny | <br>Partly Cloudy | <br>Partly Cloudy | <br>Partly Cloudy | <br>Isolated<br>Thunderstorms | <br>Partly Cloudy | <br>Partly Cloudy |

**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. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.*

**Avocados:** Mexico had an 80.3-million-pound harvest for week 16, with 66.3 million pounds shipped to the U.S. Mexican fruit continues to peak toward the 40-48 count with high dry matter of 35%. 60ct avocados have tightened up due to increased retail promotions. Current USDA pricing on 60ct is higher than 48ct. California reported a 12.7-million-pound harvest with 26% dry matter.

**Bananas:** Banana supply will remain tight due to increased global demand and declining tropical production, exacerbated by virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program.

**Pineapples: WATCHLIST** The Pineapple market will remain tight for at least the month of April. Demand continues to be high, keeping pricing stable. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, the quality and taste are good.

**Table Grapes: ESCALATED** Quality remains strong on the red and black varieties with good sizing and brix are hitting the high teens. We are seeing availability get tighter by the day as the offshore season starts to close. As the crop ages, we will start to see a bit more ambering in the greens as well as more dehydration in stems and shatter. Mexico will start scratching this week and expect volume by the first or second week of May crossing through McAllen and Nogales. Pricing will continue to climb over the coming weeks, we will not see relief until new crop out of Mexico starts over the next few weeks.

**Berries**

**Strawberries:** Overall supplies saw a decline due to rainfall and lower overall quality. Santa Maria saw a light amount of rain over the past few days, with cooler temperatures supporting improved fruit firmness and overall quality following prior heat stress. While minor defects and smaller sizing persist, pack quality remains somewhat good as crews continue disciplined sorting, and production has settled into a post-peak pattern with steady but flat volumes expected in the near term. In Watsonville and Salinas, recent rainfall has significantly impacted production, reducing volumes and increasing cull rates due to water damage and decay. Although quality remains workable, fields are still in recovery mode, and near-term production will remain highly dependent on upcoming weather conditions. Once the fields dry out and normalize, the region is expected to rebound with increasing volumes as it approaches peak production in May.

**Blackberries: WATCHLIST** Weather conditions across Mexico remain hot, though temperatures have moderated slightly from earlier in the week. Persistent heat is beginning to impact fruit condition, particularly in blackberries, while operations continue to run on schedule and volumes are moving as forecasted. Blackberry quality has seen some pressure from the heat, with approximately 80–88% of volume grading as Fancy and a reduction in Premium fruit due to impacts on size and firmness. Despite this, overall quality remains acceptable, with most defects manageable and growers maintaining strong pack standards. The region is currently in peak production, with elevated volumes expected to continue over the next two months.

**Raspberries: EXTREME** Weather conditions across Mexico remain hot, though temperatures have moderated slightly from earlier in the week. Prolonged heat is beginning to impact fruit condition, while operations continue to run on schedule and volumes are moving as forecasted. Raspberries continue to perform well under current conditions, with strong color, firmness, and flavor, and most lots grading into Premium and Fancy categories. The crop has shown greater resilience to heat compared to blackberries, with stable quality and no major operational concerns. Peak raspberry volumes are expected toward the end of April and will continue through May.

**Blueberries:** Supplies have increased significantly on blues over the past 7 days and should continue over the coming weeks. Mexico remains in peak production with stable forecasts and strong overall crop conditions. Current pack plans are focused on 6 oz, with pint availability expected to begin next week. Fruit size, consistency, and quality continue to meet expectations, and while warmer temperatures are limiting some afternoon harvest windows, overall volume projections remain unchanged. Peak production is expected to continue through mid-April into early May. The Southeast continues to experience warm, dry conditions, with limited rainfall impacting fruit sizing, particularly in Georgia. Florida production remains well below historical levels due to earlier frost damage and uneven crop development, resulting in reduced weekly output and downward-adjusted estimates. Georgia is just beginning harvest with very light early volume, primarily from initial picks, with gradual increases expected as the week progresses. Early production will focus on smaller pack sizes to align with demand. Organic production in Oxnard remains steady as the region moves toward the end of its season. Minor weather disruptions had a limited impact, and quality remains strong with consistent packouts. Current pack plans are focused on pints while supporting other committed businesses. The region is expected to taper through the coming weeks, with the season concluding in early May and availability remaining limited. The Central Valley crop remains on track, with no significant disruptions following recent storm activity. Organic production is aligned with expectations, and field conditions remain stable. Conventional programs are preparing for startup, with limited early harvest possible late next week, though meaningful volume is not expected until early May. Forecasts remain unchanged pending further field evaluations.

#### **Citrus**

**Limes: EXTREME** Rain has continued to cause harvest delays and has been impacting size in Mexico and other regions across Central America causing the size curve on limes being exported to skew heavy to 230 ct and 250s. Unfortunately, this is leaving larger sizes such as 200's, 175's and 150's extremely tight. We are also seeing moderate pressure on quality with imperfections present, such as oleocellosis. The market is easing back as more volume crosses the border, putting downward pressure on fob prices. Subbing to smaller sizes will be necessary through May to keep the supply chain stable over the next several weeks.

**Lemons:** 40/165/200's are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve. Domestic Meyer lemons are available.

**Navels:** Manifest is peaking on 72/88's. Extremely tight on 113's and 138's. This is also putting pressure on the 88's – be prepared to be offered 72's on many orders.

**Valencia's:** California Valencia's are set to begin late April/early May.

**Mandarins:** Suppliers are a bit of a mixed bag on Mandarins. Some suppliers have limited availability while others have plenty.

**Cara-Cara's, Minneolas, Bloods:** Still peaking large. Tight on the smaller sizes.

**Grapefruit:** California Star Rubies now available. Availability in Texas through April.

#### **West Coast Lettuce**

**Iceberg: EXTREME** Lettuce quality is fair and supplies are extremely limited. Weights will be light. The market is active and weather has affected both harvesting and quality. Growers expect yields to be low because of insect pressure, mildew damage, and cap leaves. Quality will be hit or miss. Shortened shelf-life issues should be expected. Growers are holding to averages when they can but prorates should be expected. We will likely not see full relief until the end of May.

**Iceberg VA: EXTREME** Quality is fair and supplies are light. We have seen reports of short shelf life, insect pressure and mildew in bags. Growers are holding to averages, and there is potential for prorates.

**Romaine & Romaine Hearts: ESCALATED** Romaine and Romaine Hearts quality is good, but supplies are tightening up. There have been reports of bruising, fringe burn, light weights, and mildew on the outer leaves. Growers are holding to averages. Hearts are now at the Extreme level

**Romaine VA: ESCALATED** Quality is good, but supplies are light. We are seeing more core in the bags and some mildew.

**Boston/Butter Lettuce: ESCALATED** Quality is good, but supplies are tightening up. Mildew and fringe burn pressure have been observed.

**Green Leaf, Better Burger and Red Leaf: ESCALATED** Quality is good, but supplies are tightening up. Mildew and fringe burn pressure persist, and carton weights remain light.

**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. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements can be reached.*

**Green Bell Pepper:** New crop breaking in South Florida and South Georgia this week as well as Coachella have put downward pressure on price. Quality is good, peaking on larger sizes in the first crown picks; this should evenly distribute over the harvest the next several days.

**Color Bell Pepper:** Good supply available on color pepper out of Florida and Mexico. The Hot House Pepper category steady out of Canada and Mexico. Overall, quality is good.

**Jicama:** New crop available. Quality is excellent.

**Mini Sweet Pepper:** Supply will be stable over the next week. Quality remains good.

**Mixed Chili Pepper:** **ESCALATED** Supplies are very tight out of Sinaloa and Sonora. We are starting to see some light numbers out of Coachella this week but nowhere near the volume needed to impact markets. The East coast should ramp up late May. Markets will be shorter this week on several varieties: Jalapeno, Serrano, Anaheim, Caribe, Habanero, Fresnos, Poblanos, and Shishito Pepper.

**Tomatillo:** Better Supply available this week and quality is good.

**Eggplant:** **ESCALATED** Domestic supply starting in the desert and still limited out of Florida; Nogales remains strong. Best quality is out of Mexico and California.

**Slicer Cucumbers:** Supply crossing through Nogales and McAllen is improving as growers break new blocks out of Mexico. We expect to see downward pressure on pricing for the remainder of the month. In the east supply is also improving as new crop out of Florida and Georgia begin to ramp up.

**English Cucumbers:** Excellent supply out of Canada, Nogales and McAllen. Quality is good.

**Pickles:** Lighter crossings through Nogales and McAllen. Quality is good.

**Green Beans:** Florida has transitioned to new crop and supply has improved as well as quality. Mexico is still harvesting and expect to until California ramps up. Quality is mixed- Florida is excellent (new crop), Mexico is hit and miss as the season winds down.

**French Beans:** **ESCALATED** Production out of Guatemala continues to improve, supporting gradually better overall availability. Mexican French bean supply remains limited as cooler weather continues to impact yields. Broader supply conditions are expected to improve as we move into May.

**Zucchini/Yellow Squash:** Lighter supply on green but light on yellow this week putting upward pressure on price. Quality is good on both colors. Georgia and California expected to start over the next 10 to 14 days.

**Herbs:** **WATCHLIST** Mint demand is expected to increase significantly as we move into May, driven by key holidays and events including the Kentucky Derby, Cinco de Mayo, and Mother's Day. Supply remains strong with excellent quality; however, we recommend placing orders early to ensure coverage during these high-demand periods. Basil and Thai basil have experienced elevated demand in recent weeks due to weather-related challenges in other growing regions. Despite this, the current supply is stable, and we are well-positioned to fulfill orders. With warmer weather in the forecast, availability is expected to remain steady moving forward.

| HERB            | SUPPLY  | QUALITY | COUNTRY OF ORIGIN |
|-----------------|---------|---------|-------------------|
| Arugula         | Steady  | Steady  | USA               |
| Basil           | Steady  | Steady  | MEX               |
| Opal Basil      | Steady  | Steady  | USA               |
| Thai Basil      | Steady  | Steady  | USA/MEX           |
| Bay Leaves      | Steady  | Steady  | USA/COL           |
| Chervil         | Limited | Steady  | USA               |
| Chives          | Steady  | Steady  | MEX               |
| Cilantro        | Steady  | Steady  | USA/MEX           |
| Cilantro        | Steady  | Steady  | Costa Rica        |
| Dill            | Steady  | Steady  | USA/MEX           |
| Epazote         | Steady  | Steady  | MEX               |
| Lemongrass      | Steady  | Steady  | USA               |
| Marjoram        | Steady  | Steady  | USA               |
| Mint            | Limited | Steady  | USA               |
| Oregano         | Steady  | Good    | USA/MEX           |
| Italian Parsley | Limited | Limited | USA               |
| Rosemary        | Steady  | Steady  | USA               |
| Sage            | Steady  | Steady  | USA/MEX           |
| Savory          | Steady  | Limited | USA               |
| Sorrel          | Steady  | Steady  | USA               |

|             |         |        |         |
|-------------|---------|--------|---------|
| Tarragon    | Limited | Steady | MEX     |
| Thyme       | Steady  | Steady | USA/MEX |
| Lavender    | Steady  | Steady | USA     |
| Lemon Thyme | Steady  | Steady | USA     |
| Lime Leaves | Steady  | Steady | USA     |

### **Melons WATCHLIST**

**Cantaloupe:** Due to heavy retail pulls on 9s and the already limited 12s and 15ct, the market is now leaning toward 6s and jumbo 9s. Domestic melons will start slowing in the next 2 weeks. Quality continues to be good. Brix levels mostly range from 12-14%.

**Honeydew: ESCALATED** The increase of Mexican product has settled the market with volume and complementary sizing. Quality on both the offshore and Mexican has been clean with good brix.

**Watermelon:** The market has seen an increase of Mexican product crossing, creating opportunities for buyers. Florida is still weeks away from having anything to offer.

### **Mixed Vegetables**

**Artichokes: ESCALATED** Quality is okay, but supplies are extremely limited. Heavy mildew pressure is keeping all sizing limited. Expect limited supplies for the next 2 to 3 weeks.

**Asparagus: EXTREME** Mexican production out of Baja remains limited, and Washington has begun with light volumes as well. Peruvian production is steady for now, though a decline is expected over the next two weeks as southern fields close due to seasonality. Markets remain highly active given the overall supply dynamics.

**Bok Choy: EXTREME** Quality is fair and supplies are limited

**Broccoli Florets/Broccoli Crowns: EXTREME** Quality is fair, but supplies are extremely limited. Reports of browning and pin rot continue. The market continues to rise. Prorates should be expected.

**Broccolini and Sweet Baby Broccoli:** Quality is good. Supplies remain light with some growers. Growers are still holding to averages.

**Brussels Sprouts:** Supplies and quality are good. We are still combating insect pressure and internal browning but overall, quality is good.

**Carrots (JUMBOS, MEDIUMS and CELLOS): EXTREME** Supplies remain tight on Baby Carrots, Cellos, and Jumbos. Rainbow Carrots remain steady with good quality and supply. Prorates should be expected. Availability will remain limited until conditions improve in late April, early May. ***Growers request orders be sent in as early as possible. At least 7-10 days ahead of time.***

**Cauliflower: EXTREME** Quality is good, but supplies are extremely limited. The market continues to rise. Prorates should be expected.

**Celery: EXTREME** Quality is just okay and supplies are tightening up. Disease pressure and increased demand are contributing to the increased pricing. Growers are holding to averages. The high market is expected to last 3-4 weeks.

**Corn, Sweet: ESCALATED** Markets are starting to ease back as growers break new production and have increased availability out of Florida while in the west, we are in transition to the desert and quality looks good. We expect to see improved supply and continued improvement on quality over the coming weeks. South Georgia will start production right around Memorial Day.

**Fennel: ESCALATED** Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

**Kale:** Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

**Leeks:** Quality and supplies look okay.

**Garlic:** Quality remains good, although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

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

**Green Cabbage: WATCHLIST** Supplies and quality are good.

**Green Onions: ESCALATED** Quality looks good and supplies are okay, but some growers are still holding to averages.

**Mushrooms:** Supply is expected to be steady for the next several weeks. Quality is good.

**Napa Cabbage: EXTREME** Quality is okay, but supplies are extremely limited. The hot weather is affecting growth and adding insect pressure.

**Parsley (Italian & Curly):** Supplies are good, but some growers have light supplies. Italian Parsley remains escalated.

**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 looks good, but supplies are light.

**Spinach:** Supplies and quality look good. Reports of weak texture, discoloration, and wilting continue.

**Spring Mix:** Supplies and quality look good.

**Snow Peas and Sugar Snaps: WATCHLIST** Guatemalan snow pea and sugar snap supplies remain steady, while Mexican snow pea availability continues to hold consistent. Sugar snap supplies are expected to tighten heading into next week.

#### Onions:

With storage crops mostly finished and rain in Texas, the market has firmed up quickly. California has also started and will be the main supplier until New Mexico starts in May.

#### Potatoes:

Potato supply for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

#### Tomatoes:

##### **Tomato Suspension Agreement Update**

*Currently, duties are being imposed on Mexican tomatoes. We do expect to see some reporting from the ITC on the impacts of duties and anti-dumping violations sometime this year. NO major immediate changes are anticipated.*

***Tomato Quality: We will continue to see pressure on the Tomato supply chain over the coming weeks as we navigate these markets. Color will be a major concern with vine ripens out of Mexico; with the lighter volume and high demand, the frequency in inventory turns is much higher which does not allow that ripening process at shipping point forcing more handling post-harvest. We recommend several actions throughout the supply chain, such as running trucks warmer to advance the ripening process, wrap pallets in transit, as well as in your inventory. Storing fruit in warmer areas in warehouses as well as back of house at store level is also recommended. These processes will assist in color management throughout the supply chain during this current market condition.***

#### **East Coast**

- **Round, Roma Tomatoes: EXTREME/ACT OF GOD** Florida will see its lightest and most critical week in production with very little volume to harvest. We expect this to change over the next 2-3 weeks. We will be in “**Demand Exceeds Supply**” conditions where we will expect to see heavy prorates and shorts during this time. We need to be flexible, having the ability to sub-size and varieties where possible to navigate the lack of supply from our Florida partners. Quality will be fair at best.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato:** Volume improving grape tomatoes while medley and cherries remain short.

#### **Mexico**

- **Round Tomatoes: EXTREME/ACT OF GOD “Demand Exceeds Supply”** Volume will be the shortest this week and will need to be flexible on sizes if you receive any or WILL NEED to sub to Romas. This is all due to heavy disease pressure out of Sinaloa forcing that season to wind down prematurely and other regions are very slow to start or still weeks away from starting. We are seeing some very light picks start out of Baja so there may be some relief over the next 2-3 weeks. Expect to see color challenges, prorates and outright cuts over the next several weeks. Quality will be mixed; older fruit will have more imperfections while fruit from newer production will see far better quality.
- **Roma Tomatoes: EXTREME** There is a huge variance in quality and price this week; older production out of Sinaloa is riddled with Blight and compromised which will cause a dramatic drop off in volume, Fortunately we are seeing newer production out of Sonora ramp up and where quality is strong and will call for a premium; unfortunately there is not enough volume of out this region to cover the deficit left in Sinaloa and will be running short for the next several weeks. Markets are volatile and will change daily. We suggest being flexible on sizing and open to subbing rounds during this market condition.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato: ESCALATED** Grape Tomato supply will be hit and miss the remainder of the week and should start to ease back crossing through Nogales and McAllen. Grape Medley and Cherry tomatoes will remain very short. Quality on what is crossing is good.

**Other Fruit:**

**Apples:** The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

**Pears:** **D'Anjou** availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. **Red D'Anjou** pears are moderately available in US #1 35–55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

**Pomegranate:** Limited Supply out of Israel.

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

**Cherries:** Starting in California, NEW CROP.

**Stone Fruit:** Light supply on Peaches, Plums and Apricots currently out of Chile.

**Papaya:** Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

**Mangoes:** Light supply out of Mexico Peru and Puerto Rico. Varieties: Kents, Tommys, and Ataulfo.

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

**Quince:** Limited supply available this week.