



Overview

Markets continue to improve as Tomato production increases out of Mexico. We should start to see more availability this week on Romas, Rounds and Grapes; Cherries seem to still be light. We may see volume start to gradually decrease out of Florida as the East Coast starts to transition north for the local programs; we should see this transition over the next 7-14 days. 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. Squash and Bell Pepper will remain active this week.

Unfortunately, the market remains very volatile right now. We are experiencing high markets and shortages on multiple items. Demand exceeds supply for many commodities. Brussels Sprouts, Celery, Romaine, Red Leaf and Green Leaf have extremely limited supplies. Romaine, Red Leaf and Green Leaf all remain at the extreme trigger level. Prorates should be expected on those items. Carrots continue to face ongoing supply challenges, with full recovery expected in the next 2 weeks. **Brussels Sprouts, Romaine and Green Leaf coverage will be a large factor for the remainder of this week and going into next week.** Brussels Sprouts are expected to have limited supplies until July. While Iceberg is still limited, supplies have improved and growers should be covering orders. Growers anticipate that the weather conditions will create quality and supply issues for the next several weeks, but the weather and supplies are improving so hopefully we will start to see some relief in June on the Leafy Greens and Carrots.

Import Cantaloupe and Honeydew production should last another week, providing some freight savings for east coast customers loading in Florida. Arizona started early due to warmer temperatures, but there are good supplies on both. Pineapple availability remains tight, and we recommend having size flexibility. Mexican Avocado harvest has slowed down over the last two weeks causing field pricing to increase sharply. This trend is expected for the next six weeks or until offshore volume from Columbia and Peru increase. Berry markets are trending toward stable markets as California production continues to ramp up across multiple categories, helping offset gradual declines from Mexico and eastern growing regions. Strawberry and Raspberry supplies are improving with stronger California output anticipated into June, while Blueberry and Blackberry markets remain supported by steady domestic production and peak Mexican volumes. Quality across all berry categories remains generally strong, with only isolated concerns related to firmness, bruising, split fruit, and weather-related sizing issues.

Citrus markets are experiencing tight supplies on smaller sizes across many varieties, including Lemons, Navels, Cara-Caras, and Blood Oranges, with fruit generally trending large. Some suppliers are holding averages on Lemons due to transitioning districts. Please be in close contact with your supplier on this matter and give ample lead time. Cara-Caras are winding down and should be finished soon. Domestic Meyer Lemons are coming to an end, and imports will begin in June. California Valencia's are beginning in a small way. 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









- Avocados – **ESCALATED**
- Asparagus – **ESCALATED**
- Boston/Butter Lettuce – **ESCALATED**
- Broccoli Crowns/Asian Cut – **ESCALATED**
- Cabbage, Red – **ESCALATED**
- Carrots – **EXTREME**
- Celery – **ESCALATED**
- Fennel, Anise – **EXTREME**
- French Beans – **ESCALATED**
- Green Leaf/Red Leaf Lettuce – **EXTREME**
- Kale – **EXTREME**
- Lettuce, Iceberg – **ESCALATED**
- Limes – **ESCALATED**
- Napa – **ESCALATED**
- Parsley Italian – **ESCALATED**
- Romaine – **EXTREME**
- Romaine Hearts – **EXTREME**
- Table Grapes – **ESCALATED**
- Tomatoes (Roma) Mexico and Florida – **ESCALATED**
- White Asparagus – **ESCALATED**

Watch List









1. Artichokes
2. Blackberries
3. Brussels Sprouts
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 5/21	Fri 5/22	Sat 5/23	Sun 5/24	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28
67° 49°F	62° 51°F	63° 52°F	63° 51°F	62° 51°F	62° 50°F	64° 49°F	65° 50°F
							
Mostly Sunny	AM Fog/PM	Partly Cloudy	AM Clouds/PM	AM Clouds/PM	AM Clouds/PM	Mostly Sunny	Mostly Sunny









YUMA, AZ

Thu 5/21	Fri 5/22	Sat 5/23	Sun 5/24	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28
98° 66°F	96° 66°F	95° 65°F	97° 66°F	98° 66°F	95° 65°F	91° 63°F	91° 66°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









OXNARD, CA

Thu 5/21	Fri 5/22	Sat 5/23	Sun 5/24	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28
68° 56°F	67° 55°F	65° 54°F	66° 54°F	65° 54°F	64° 54°F	65° 53°F	65° 54°F
							
Partly Cloudy	AM Clouds/PM	AM Clouds/PM	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny









JALISCO, NAYARIT

Thu 5/21	Fri 5/22	Sat 5/23	Sun 5/24	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28
87° 63°F	87° 63°F	86° 63°F	88° 62°F	87° 62°F	85° 63°F	84° 62°F	85° 62°F
							
Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Sunny









VIZCAINO, BAJA SUR

Thu 5/21	Fri 5/22	Sat 5/23	Sun 5/24	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28
98° 69°F	97° 71°F	96° 69°F	100° 69°F	99° 71°F	96° 69°F	96° 68°F	96° 69°F
							
Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny









TORREON, COAHUILLA

Thu 5/21	Fri 5/22	Sat 5/23	Sun 5/24	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28
87° 63°F	89° 66°F	85° 64°F	92° 66°F	95° 70°F	93° 67°F	95° 67°F	97° 70°F
							
AM Clouds/PM	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Mostly Cloudy	Partly Cloudy	Mostly Sunny

PLANT CITY, FL

Thu 5/21	Fri 5/22	Sat 5/23	Sun 5/24	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28
92° 72°F	94° 74°F	94° 74°F	93° 74°F	94° 74°F	92° 73°F	90° 72°F	90° 72°F
							
PM	Partly Cloudy	Partly Cloudy	PM	PM	PM	PM	PM
Thunderstorms			Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms

LAKE PARK, GA

Thu 5/21	Fri 5/22	Sat 5/23	Sun 5/24	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28
92° 69°F	88° 70°F	88° 70°F	89° 70°F	89° 70°F	89° 70°F	86° 69°F	87° 69°F
							
Partly Cloudy	PM	Mostly Cloudy	PM	PM	Partly Cloudy	PM	PM
	Thunderstorms		Thunderstorms	Thunderstorms		Thunderstorms	Thunderstorms

Fruits & Vegetables

Tariff Update: *President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.*

Avocados: ESCALATED As we near the end of the main crop the remaining Mexican growers are strategically slowing harvest activity in anticipation of stronger late-season pricing, which has caused field prices to escalate rapidly over the past two weeks as packers compete for tighter supplies. California harvested has increased to 15 million pounds a week, Columbian fruit is trickling in slowly, but the market will need Peru to come in strong in mid-June to offset the lower Mexican volume. The Mexican Loca season is expected to start in July, early reports show a 9% reduction in volume but with other COO providing fruit we are hoping for a stable market in the summer. Dry matter remains high at 36%, which is normal for the end of the season crop.

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 remains tight as demand continues to be high. 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 sending significant volume next week with Coachella scratching by the second week of May.

Berries

Strawberries: Strawberry markets are expected to slightly improve over the next several weeks as California production continues to build. Santa Maria is seeing steady volumes with warmer weather expected to push additional production, while Watsonville and Salinas are forecasted to gradually increase volume with peak production expected around the second week of June. Overall quality remains good across both conventional and organic fruit, with only minor issues such as occasional bruising, overripe fruit, and some misshapen berries being reported.

Blackberries: WATCHLIST Blackberry markets are expected to remain steady to slightly softer as Mexico continues through peak production over the next two months. Overall quality from Mexico remains strong, although warmer temperatures have slightly affected berry size and firmness. Watsonville fields continue to develop well, though cooler weather has delayed timing slightly compared to historical averages. Conventional harvests are expected to begin around June 1, while the organic program is now projected to start in early July.

Raspberries: Raspberry markets are expected to remain promotable with strong overall supply through May, supported primarily by Mexico's peak production. Mexican raspberries continue to show excellent color, firmness, and flavor across both conventional and organic programs. Watsonville production remains in early-stage harvest conditions with strong quality and appearance, though volumes are expected to stay light for the next two weeks before seeing a more meaningful increase in early June.

Blueberries: Blueberry markets are expected to remain mostly steady in the near term, though some regions are beginning to trend lighter as seasonal transitions occur. Mexican production is gradually declining, while Florida and Georgia remain stable for the coming week before also easing. California's Central Valley continues to ramp up and is expected to peak through the end of May, helping offset declines from other growing regions. Quality overall remains good, with only minor reports of split fruit coming from the Central Valley.

Citrus

Limes: ESCALATED Supply continues to improve but still experiencing issues with sizing on fruit out of Mexico and other regions across Central America; the size distribution will continue to skew heavy to 230 ct and 250s. Unfortunately, this is leaving larger sizes such as 175's and larger extremely tight. We are also seeing moderate pressure on quality with imperfections present, such as oleocellosis. The market will stay firm through Memorial Day; the long-term outlook remains consistent with 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: 140/165/200's are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve. There are also averages in place.

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 in a small way.

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

Cara-Cara's and Bloods: Still peaking large. Tight on the smaller sizes. Cara-Caras are winding down.

Grapefruit: California grapefruit available!

West Coast Lettuce

Iceberg: ESCALATED Lettuce quality is good, and supplies are still limited with some growers but are improving. Weights will be light. Shortened shelf-life issues should be expected. Growers are holding to averages.

Iceberg VA: ESCALATED Quality is good and supplies are light but are improving. We have seen reports of short shelf life, insect pressure and mildew in bags. Growers are holding to averages.

Romaine & Romaine Hearts: EXTREME Romaine and Romaine Hearts quality is fair, and supplies remain **extremely** limited. There have been reports of bruising, fringe burn, light weights, and mildew on the outer leaves. Growers are holding to averages when they can, but severe prorates should be expected next week. Romaine supplies look to remain limited for the next few weeks.

Romaine VA: EXTREME Quality is okay, but supplies are **extremely** limited. Prorates should be expected. We are seeing more core in the bags and some mildew.

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

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

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Green Bell Pepper: Light supply out of South Florida and Coachella this week; México is about done and will see limited volume crossing through McAllen; Nogales should be wrapping up for the season very soon. Quality is good out of all regions. South Georgia will start with good volume in two weeks.

Color Bell Pepper: Lighter supply available on color pepper out of Florida and Mexico. The Hot House Pepper category steady out of Canada and Mexico. Coachella should start by Mid-May. 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: Supplies stable on most varieties: Decent numbers crossing from Mexico; Coachella and South Georgia are ramping up as well. Markets will be shorter this week on Fresnos and Poblanos.

Tomatillo: Good supply and quality available this week.

Eggplant: Steady supply available out of South Florida, Nogales and Coachella. Quality is good.

Slicer Cucumbers: Supply crossing through Nogales and McAllen will tighten up as the season starts to close. In the east we are seeing good supply out South Georgia. Quality is good from all shipping points.

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

Pickles: Lighter supply available out of Central Florida and Nogales. Quality is mixed. South Georgia should start over the next 7-10 days.

Green Beans: Florida is done for the season, and we have transitioned to South Georgia. Mexico is still harvesting a few beans but will wrap up very soon. California supply is steady. Overall, quality is good.

French Beans: ESCALATED Supply of both organic and conventional French beans out of Guatemala is good and continuing to improve. Conventional French bean availability out of Mexico remains fair.

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 week.

Herbs: WATCHLIST Basil supply and quality continue to improve. Supplies remain steady with fair quality across most other herb varieties, with the exception of savory and lemon thyme.

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	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA/MEX
Savory	Steady	Steady	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

Cantaloupe: Import volume will last until next week, while quality remains good to finish out the season. Domestic melons have started and there are plenty of cantaloupes available.

Honeydew: Production is steady as supplies from Yuma have started. Quality on both the offshore and domestic has been clean with good brix.

Watermelon: The market has become steady since domestic volume has increased. Yuma, Texas and Florida all have good quality and availability.

Mixed Vegetables

Artichokes: WATCHLIST Quality is good, but supplies are light.

Asparagus: ESCALATED Mexican production out of Baja has improved, while Washington continues to see strong volume levels. Peruvian production remains steady, and both Michigan and Canadian production continue to improve daily as seasonal volumes ramp up. Markets have become less active overall as multiple growing regions are now in production, helping improve overall availability.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: ESCALATED Quality is good and supplies have improved. Reports of browning and pin rot continue. Crowns are still escalated but the market is trending down.

Brocolini and Sweet Baby Broccoli: Quality is good, but supplies are still limited with some growers.

Brussels Sprouts: WATCHLIST Quality is fair and supplies are limited. Growers are still combating insect pressure and internal browning. The weather in MX is warming up and that is also causing quality issues and reduced yields there. Growers are holding to strict 10-week averages and are expecting the market to tighten further. Supplies will be limited until July, and the market is rising due to the limited supplies.

Carrots (JUMBOS, MEDIUMS and CELLOS): EXTREME Supplies remain tight on Baby Carrots, Cellos, and Jumbos. Rainbow Carrots remain steady with good quality and supply. Availability will remain limited for just a few more weeks. Relief is on the horizon **Growers request orders to be sent in as early as possible. At least 7-10 days ahead of time.**

Cauliflower: Quality is good and supplies have improved.

Celery: ESCALATED Quality is just okay and supplies are limited. Disease pressure and increased demand are contributing to the increased pricing. Growers are holding to averages but supplies are improving.

Corn, Sweet: Steady supply out of South Florida and South Georgia; In the west Coachella is done and Brentwood is ramping up. Quality is good.

Fennel: EXTREME 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: EXTREME 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: Quality looks good and supplies are okay. 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: ESCALATED Quality looks good, but supplies are light.

Spinach: Supplies are a little tight, but quality looks good. Reports of weak texture, discoloration, and wilting continue.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: WATCHLIST Mexican snow pea supplies remain steady, while sugar snap availability continues to be limited. Supply conditions out of Guatemala remain unchanged for both snow peas and sugar snaps.

Onions:

California and New Mexico have started and supplies are stable, but pricing remains elevated. Production in Central California has started slowly but will ramp up in volume in the coming weeks. Overall, quality has been good in both areas.

Potatoes:

We are starting to see some movement in the potato market as we head into the summer. Suppliers are seeing a shift in the size profile towards smaller count sizes 70-120ct while 40-60cs have become tighter. Suppliers are watching inventories closely to make sure there is enough to last until new crop and to check for quality issues.

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.

East Coast

- **Round Tomatoes:** Volume will begin to decrease over the coming weeks as growers prepare for the next transition. We expect to be into South Georgia and South Carolina the first week of June. We should see continued consistency of supply and much better quality over the coming weeks.
- **Roma Tomatoes: ESCALATED** Steady supply and good quality expected over the next ten days as grower break new fields in Central Florida. We will see volume decline over the coming weeks as growers prepare for the next transition. We expect to be into South Georgia and South Carolina the first week of June. We should see continued consistency of supply and much better quality on the horizon.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato:** Volume improving grape tomatoes while medley and cherries remain short.

Mexico

- **Round Tomatoes:** Supply will remain firm on round tomatoes for another 10 to 14 days but should improve as newer blocks break on the baja and Southern Mexico. Quality is outstanding on what is crossing this week.
- **Roma Tomatoes: ESCALATED** Improving supply and quality available out of Jalisco and Baja. We expect this trend to continue and get back to a stable market over the next 7 to 10 days.
- **Snacking Tomatoes: Grapes, Grape Medley and Cherry Tomato:** Grape Tomato supply will improve this week crossing through Nogales and McAllen. Grape Medley and Cherry tomatoes will remain very short. Quality on what is crossing is good.

California

- Expected to Start first week of June.

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: Ramping up out of California.

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.