



**Overview**

Markets continue to improve as Tomato production increases out of Mexico. Florida and the East Coast are now ramping up production and expect to see daily improvements on all items. The rain we have seen in the South over recent days is slowing production down and keeping pricing elevated. This is expected to subside once more regions come online. The Lime market will start to ease back as more volume crosses 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 volatile and Salinas is currently experiencing some rain. This will affect harvesting and contribute to disease pressure. We are seeing high markets and shortages on multiple items. Demand exceeds supply for many commodities. Artichokes, Brussels Sprouts, Celery, Romaine, Red Leaf and Green Leaf have extremely limited supplies. Romaine and Green Leaf remain at the extreme trigger level. Prorates should be expected on those items. Carrot supplies are still slightly limited, but quality and supplies have improved. We should see full relief in the next 2 weeks. **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. Iceberg is still limited, supplies have improved, but growers are still holding to 6-week averages. Growers anticipate supply issues to continue for the next several weeks,

The Avocado market has tightened due to a combination of one growing season finishing and a decline in grower participation. This reduction in harvest volume has led to a sharp increase in field prices over the past two weeks. The market is pivoting to bring extra fruit from Colombia and Peru. The next crop for Mexico is Flor Loca, which usually starts in July, has been giving approval to start early. These adjustments will provide some relief over the next several weeks. Some suppliers have declared Force Majeure, due to the uncontrollable situation, but will return to contract pricing once the market stabilizes. Import Cantaloupe and Honeydew are done, and all production has shifted to Arizona. With Arizona starting early due to warmer temperatures, some suppliers are concerned that they will finish early and possible gap before California is ready. Currently, supplies are good on both Cantaloupes and Honeydews. Pineapple availability remains tight, and we recommend having size flexibility. Berry markets are expected to remain mostly stable as California production continues to build across multiple categories while Mexican supplies remain supportive. Strawberries and Raspberries are expected to see improved availability heading into June as Watsonville production ramps up, while blueberry supplies remain steady with California peaking and eastern regional production ending. Blackberry markets remain well supplied from Mexico, though warmer temperatures continue to create some minor sizing and firmness concerns across bushberry categories.

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 and tightening supplies. Please be in close contact with your supplier on this matter and give ample lead time. Cara-Caras are finished for the season. Domestic Meyer Lemons are coming to an end, and imports will begin in June. California Valencia's are beginning in a small way, and some suppliers are reporting that there will be challenges in supply on Valencias this season. 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 – **EXTREME**
- Asparagus – **ESCALATED**
- Artichokes – **EXTREME**
- 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**
- White Asparagus – **ESCALATED**









**Watch List**

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









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

Thu 5/28	Fri 5/29	Sat 5/30	Sun 5/31	Mon 6/1	Tue 6/2	Wed 6/3	Thu 6/4
61°   50°F	65°   53°F	65°   48°F	71°   52°F	71°   52°F	68°   52°F	69°   53°F	69°   52°F
							
Rain	Mostly Cloudy	AM Clouds/PM	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy









**BAKERSFIELD, CA**

Thu 5/28	Fri 5/29	Sat 5/30	Sun 5/31	Mon 6/1	Tue 6/2	Wed 6/3	Thu 6/4
70°   56°F	76°   57°F	84°   59°F	89°   63°F	94°   66°F	95°   66°F	94°   65°F	95°   67°F
							
PM Showers	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









**OXNARD, CA**

Thu 5/28	Fri 5/29	Sat 5/30	Sun 5/31	Mon 6/1	Tue 6/2	Wed 6/3	Thu 6/4
65°   53°F	67°   54°F	69°   55°F	73°   57°F	71°   56°F	69°   56°F	70°   58°F	71°   58°F
							
Mostly Cloudy	Mostly Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Mostly Sunny









**JALISCO, NAYARIT**

Thu 5/28	Fri 5/29	Sat 5/30	Sun 5/31	Mon 6/1	Tue 6/2	Wed 6/3	Thu 6/4
88°   61°F	87°   62°F	86°   63°F	85°   63°F	85°   65°F	86°   65°F	86°   63°F	86°   63°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









**VIZCAINO, BAJA SUR**

Thu 5/28	Fri 5/29	Sat 5/30	Sun 5/31	Mon 6/1	Tue 6/2	Wed 6/3	Thu 6/4
98°   70°F	99°   70°F	100°   71°F	99°   69°F	99°   70°F	101°   70°F	100°   70°F	100°   70°F
							
Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Sunny









**TORREON, COAHUILLA**

Thu 5/28	Fri 5/29	Sat 5/30	Sun 5/31	Mon 6/1	Tue 6/2	Wed 6/3	Thu 6/4
98°   68°F	101°   74°F	99°   73°F	95°   68°F	97°   70°F	97°   69°F	93°   68°F	94°   67°F
							
Sunny	Mostly Sunny	Partly Cloudy	PM Thunderstorms	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny

**PLANT CITY, FL**

Thu 5/28	Fri 5/29	Sat 5/30	Sun 5/31	Mon 6/1	Tue 6/2	Wed 6/3	Thu 6/4
87°   74°F	92°   75°F	87°   75°F	88°   75°F	87°   74°F	90°   73°F	88°   72°F	84°   71°F
							
Isolated Thunderstorms	Partly Cloudy	AM Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Thunderstorms	Scattered Thunderstorms

## LAKE PARK, GA

Thu 5/28	Fri 5/29	Sat 5/30	Sun 5/31	Mon 6/1	Tue 6/2	Wed 6/3	Thu 6/4
85°   70°F	89°   71°F	86°   71°F	84°   70°F	86°   70°F	88°   68°F	86°   67°F	83°   66°F
							
PM	PM	PM	Thunderstorms	PM	PM	PM	Showers
Thunderstorms	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: EXTREME** 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 three weeks as packers compete for tighter supplies. California harvested has increased to 17 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 that usually starts in July has recently been approved to start early. Dry matter from Mexico remains high at 36%, which is normal for the end of the season crop. California dry matter is now hit 27%.

**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 remain mostly stable, though supplies out of Santa Maria are beginning to taper slightly while Watsonville and Salinas production remains challenged following mid-week rainfall. Santa Maria volumes are forecasted to decline modestly next week, while recent rain in Watsonville and Salinas is expected to delay the anticipated production increases as the season continues to progress. Overall quality remains good across all growing regions, with only occasional reports of bruising, overripe fruit, and slightly smaller sizing, while misshapen fruit has improved significantly.

**Blackberries: WATCHLIST** Blackberry markets are expected to remain stable with strong Mexican production continuing through the next two months while California harvests slowly ramp up. Mexican supplies remain at peak levels, though warmer temperatures have slightly impacted berry size and firmness. Watsonville crop development continues to progress well, though cooler weather has slightly delayed timing, with conventional harvest expected to begin around June 1 and organic production projected to start in early July.

**Raspberries:** Raspberry markets are expected to remain promotable through the remainder of May with strong Mexican production continuing to drive supply. Mexico remains in peak volume with excellent color, firmness, and flavor being reported across both conventional and organic fruit. Watsonville production remains in early-stage harvest conditions with light volumes expected over the next two weeks before a more meaningful increase begins in early June.

**Blueberries:** Blueberry markets are expected to remain steady overall as strong California production offsets declining Mexican volumes and the conclusion of the Florida and Georgia seasons. California's Central Valley is currently peaking with strong conventional and organic volumes, while Mexican production is slightly higher week over week but expected to gradually decline heading into June. Quality remains strong overall, with excellent bloom, crisp texture, and flavor being reported from California, while Mexico is seeing only minor heat-related defects.

### 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. Markets are expected to remain firm through Mid-June with the long-term outlook expectations of downward pressure on fob prices. Subbing to smaller sizes will be necessary through Mid-June to keep the supply chain stable over the next several weeks. Overall quality is expected to decline due to weather-related pressure.

**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:** Mandarins are finishing up and imports are coming in. Be in contact with your supplier on other varieties or imports as alternative options.

**Cara-Cara's and Bloods:** Still peaking large. Tight on the smaller sizes. Cara-Caras are finished up for the season.

**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. 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.

**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:** 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 remains good. Conventional French bean availability out of Mexico is currently 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:** Sizing in Arizona has shifted from 9ct to 12ct, but suppliers think the profile should get better next week. We will continue to monitor the spring Arizona crop and if they have enough product to make it until July.

**Honeydew:** Sizing on Honeydew has also shifted; growers are getting more 8ct and less 5ct. There is some external scarring due to high winds, but overall quality is good.

**Watermelon:** The market has plenty of supply and is gearing up for the big 4<sup>th</sup> of July pull. All growing regions in the US are experiencing good quality, and pricing has dropped ahead of the holiday.

### Mixed Vegetables

**Artichokes: EXTREME** Quality is good, but supplies are light, which is driving the market.

**Asparagus: ESCALATED** Mexican production out of Baja continues to improve, while Washington maintains strong volume levels. Peruvian production remains steady, and both Michigan and Canadian production continue to build as seasonal availability increases. Markets have become less active overall as multiple growing regions are now producing at good volume levels, helping improve overall supply conditions.

**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.

**Broccolini 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. We do expect to see some cost increases over the coming months. In recent years Canadian mushroom Farmers received unfair subsidies giving them a clear advantage over the domestic mushroom farming industry. USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62-4.97%. These duties will be applied once the ruling is formally published This will not only increase the price of import mushrooms from Canada but certainly put upward pressure on price of domestically grown product as well; this is something Domestic growers have been seeking for some time to support the increases in their operating cost the past five years.

**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** Supply of Guatemalan snow peas and sugar snaps remain steady overall. Mexican snow pea supplies continue to be stable, while sugar snap availability is currently fair.

#### **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.

**Sweet Potatoes:** The sweet potato market has tightened as the industry moves into the final stretch of the 2025 storage crop. Limited supplies remain available nationwide, but inventories are gradually declining, particularly on premium U.S. No. 1 grades and larger counts.

Demand from both retail and foodservice continues to remain steady to strong, supporting a firmer market heading into summer. North Carolina and Mississippi growers are reporting lighter yields and tighter availability due to weather-related challenges from last season. Quality remains generally good; however, some lots are showing increased cosmetic defects and shrink tied to weather stress from last growing season. New crop harvest is expected to begin in limited volumes during August, with broader availability arriving in September.

## **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:** 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:** 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.