



Weekly Market Review March 27, 2025

Overview

President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, will not take effect until April 2nd. With that, we will continue to see strong production out of South Florida on several items, with good quality and availability across multiple commodities with similar conditions being observed in Nogales and McAllen. Markets are much tighter this week on tomatoes as we start the transition from the Winter crops to Spring. Tomatoes out of Florida will be tight for the next three to four weeks which is pushing buyers west to Mexico. Supply is already short due to the transition; Mexico will see much higher prices this week and lighter supply, particularly on rounds. We are also seeing short supply on Yellow Squash, premium sized Green Bells, Pickles, Shishitos, Red Fresnos and Caribe Peppers. The Offshore Table Grape season has improved with stable supply. Melons have also turned the corner, showing excellent volume and quality out of the ports as well as crossing through Nogales. Banana and Pineapple availability remains limited; shippers are asking we continue to be flexible in Pineapple sizes. Industry supply remains limited, and the market is tightening as supply stabilizes. Avocado market conditions remain strong this week, with high demand, particularly for small- and medium-sized fruit, keeping prices elevated. The price gap between large and small fruit is beginning to narrow as smaller sizes climb in value. A significant portion of small fruit is being retained in the Mexican domestic market ahead of Lent and Easter, contributing to tighter supply. The industry continues to experience a high percentage of Grade 2 fruit out of Mexico, a trend expected to persist. California production has increased and is expected to gain momentum heading into April. We anticipate continued market volatility through April due to the timing of Easter and Cinco de Mayo. Holy Week will result in fewer harvest days, coinciding with a period when the industry typically prepares for Cinco demand. Looking ahead, additional volume from other countries of origin is expected to provide more market stability and potentially lead to lower price points by May. Projections indicate strong volumes for next week; however, due to ongoing tariff uncertainty, we anticipate another decline in available inventories. Transition has started and you will see growers moving into Huron, Oxnard and Salinas. Transition has started for many growers while others are just a few weeks away from making the move. It is always a hectic time, but the growers are doing everything they can to ensure a smooth transition. Unfortunately, the weather is once again a bit of a challenge in Yuma. We had a heat advisory in effect this week and the hot weather has put some stress on the products. Growers are harvesting earlier in the day so that will help lessen some of the issues, but the heat can cause increased insect pressure, mildew, internal burn and crop fatigue. The growers are navigating the best that they can, but there may be some inconsistent crop performance due to this heat wave with commodities that are coming out of Yuma. The good news for Yuma is that it looks like the weather will cool down over the next few days. Overall, for now, supplies are looking good, but with transition in full swing, we will also see the normal issues with supplies and quality as we go through this process. Lettuce is already seeing tighter supplies and lighter weights. You can expect to see that market continue to rise and yields continue to decrease while growers are making their transitions. Cauliflower has improved since last week and is no longer escalated. We also know that bugs will be a potential issue, especially on Cilantro and Kale, so we will continue to keep a close eye on those items. Endive, Escarole, Cilantro, and Spinach remain escalated, with supply shortages driving the market. Bok Choy, Fennel and Leeks remain at the extreme trigger level and Napa has also been added to the Extreme list. Red Cabbage is still slightly escalated and looks like it will remain that way through transition. Insects will be something that the fields will battle throughout March. We will keep an eye on all leafy greens and keep everyone updated on any issues. Growers, again, will do their best to prevent any supply gaps and will try to get the best quality, but some issues should be expected in the coming weeks.









Alert List

- Asparagus – ESCALATED
- Avocados – ESCALATED
- Bok Choy – EXTREME
- Cabbage, Red – ESCALATED
- Cilantro – ESCALATED
- Endive and Escarole – ESCALATED
- Fennel, Anise – EXTREME
- Herbs – ESCALATED
- Hot Peppers (Caribe) – ESCALATED
- Leeks – EXTREME
- Limes – ESCALATED
- Napa – EXTREME
- Parsley (Italian & Curly) – ESCALATED
- Romaine Hearts Organic-ESCALATED
- Spinach – ESCALATED
- Tomatoes (Rounds, Romas, Snacking) – ESCALATED









Watch List

1. Banana and Pineapple
2. Arugula
3. Broccoli
4. Broccolini
5. Cabbage, Green
6. Cauliflower
7. French Beans
8. Lettuce, Iceberg
9. Lettuce, Romaine
10. Lettuce, Green Leaf and Red Leaf
11. Pickles
12. Ginger
13. Snow Peas & Sugar Snap Peas
14. Squash, Yellow
15. Eggplant









Weather
OXNARD, CA

Thu 3/27	Fri 3/28	Sat 3/29	Sun 3/30	Mon 3/31	Tue 4/1	Wed 4/2	Thu 4/3
62° 52°F	64° 49°F	63° 49°F	58° 53°F	61° 51°F	61° 47°F	57° 48°F	57° 48°F
							
AM Clouds/PM Sun	Partly Cloudy/Wind	Mostly Cloudy	PM Showers	Cloudy	Partly Cloudy/Wind	Showers	Showers









YUMA, AZ

Thu 3/27	Fri 3/28	Sat 3/29	Sun 3/30	Mon 3/31	Tue 4/1	Wed 4/2	Thu 4/3
91° 62°F	84° 59°F	83° 56°F	84° 61°F	86° 63°F	81° 59°F	79° 57°F	76° 55°F
							
Sunny	AM Clouds/PM	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy









HERMOSILLO, SONORA

Thu 3/27	Fri 3/28	Sat 3/29	Sun 3/30	Mon 3/31	Tue 4/1	Wed 4/2	Thu 4/3
93° 59°F	91° 58°F	87° 56°F	89° 59°F	96° 62°F	93° 61°F	89° 60°F	86° 60°F
							
Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy









JALISCO, NAYARIT

Thu 3/27	Fri 3/28	Sat 3/29	Sun 3/30	Mon 3/31	Tue 4/1	Wed 4/2	Thu 4/3
81° 50°F	81° 50°F	82° 51°F	83° 53°F	85° 54°F	85° 54°F	85° 55°F	84° 55°F
							
Sunny	Sunny	Sunny	Mostly Sunny	Mostly Sunny	Sunny	Sunny	Mostly Sunny









VIZCAINO, BAJA

Thu 3/27	Fri 3/28	Sat 3/29	Sun 3/30	Mon 3/31	Tue 4/1	Wed 4/2	Thu 4/3
92° 55°F	92° 56°F	93° 56°F	94° 57°F	96° 58°F	95° 58°F	95° 59°F	95° 59°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

CULICAN, SINALOA

Thu 3/27	Fri 3/28	Sat 3/29	Sun 3/30	Mon 3/31	Tue 4/1	Wed 4/2	Thu 4/3
92° 56°F	92° 55°F	92° 56°F	93° 57°F	96° 58°F	95° 58°F	94° 58°F	95° 58°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny

IMMOKALEE, FL

Thu 3/27	Fri 3/28	Sat 3/29	Sun 3/30	Mon 3/31	Tue 4/1	Wed 4/2	Thu 4/3
87° 61°F	83° 65°F	85° 67°F	86° 66°F	88° 66°F	89° 68°F	92° 69°F	92° 67°F
							
Mostly Sunny	Partly Cloudy	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	Mostly Sunny	Mostly Sunny	Mostly Sunny

Fruits & Vegetables

Tariff Update: President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, are expected to be implemented on April 2nd.

Avocados: ESCALATED A 65.5M pound harvest was reported for week 12, and 50.9M pounds were shipped to the U.S. Jalisco currently represents 7.6% of the volume sent to the U.S. from Mexico. The avocado industry has been in a correction cycle for most of the year – with supply & demand not matching week-over-week. USDA reported strong increases on 60 & 70s, with 40 & 48s softening. Mexico's Main Crop currently has a dry matter estimate of 33.2%. California harvests have ramped up. Approximately 7.7M pounds were harvested in week 12. Dry matter is averaging 25%. If favorable weather continues, weekly harvests are expected to increase throughout April. The Traviesa Crop has begun with limited volumes out of Colombia. Sizing is focused on medium and small sizes. Availability is anticipated to increase as the season progresses, lasting from the end of April through the summer months. Peak volumes are expected between May and July, pending favorable weather conditions. Projections call for strong volumes for next week, but with the tariff uncertainty, we expect another decline in available inventory.

Bananas: WATCHLIST: Banana imports remain light but will improve slowly over the coming weeks as more vessels arrive from the Tropics. A combination of cooler and poorer-than-desired weather in the tropics as well as logistic challenges impacted the global supply over the past three weeks. We could see minor pro-rates across the network but that should subside this week. Overall, banana quality has been good despite being in the winter cycle. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to store fruit in warmer locations or wrap fruit. With inventories being light, we see higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival.

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

Table Grapes: Stable supply is available on whites, reds, globes and black varieties. Mexico is expected to start in 4 weeks.

Berries

Strawberries: Overall supplies are steady, but we might see markets tighten slightly as Mexico and Florida are coming to an end due to seasonality. Production will shift to the western regions. Following 1.85" of rain and cooler temperatures last week, weather conditions in Santa Maria have stabilized, with a warming trend expected into early next week. Despite weather challenges, fruit quality has held up well, thanks to proactive harvesting ahead of the storm and cooler temps that preserved firmness. Cleanup passes saw 25–40% damage, but the fruit remains large to extra-large, with good shape and sheen. Green fruit sets are strong, and production is expected to increase significantly as harvest crews move to piece-rate picking. The region is on track to reach peak production between mid-April and early May, with later-planted blocks continuing into June. Organic fields show good volume, though culling remains high due to earlier damage. The Salinas/Watsonville region received about 3" of rain last week, which delayed early season progress. Some scratch pickings occurred prior to the rain, but crews are now focused on maintaining plant health. Initial packing is expected in early April as the season begins ramping up. Florida is experiencing warmer temperatures, with highs in the 70s–80s and lows in the 40s. A brief rain event last week caused minimal disruption, and fruit quality remains strong, with some concerns over bruising and over ripeness due to heat-driven ripening. Pest pressure remains low, and no decay has been reported. However, production volumes dropped sharply as growers began winding down the season ahead of more extreme heat. Florida's strawberry season is expected to end officially next weekend, though some operations may finish earlier based on weather and labor conditions.

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: Fruit quality looks strong, with a vibrant red color, good firmness, and a nice range of variety sizes, primarily medium with occasional larger berries. While some overripe and crumbled fruit is being observed, crews are actively working to keep these out of final packs. Raspberry volume remains at a consistent peak and is expected to hold through the end of April. Organic production is also performing well, with solid availability anticipated through March as we move into peak harvest.

Blueberries: Weather in Mexico remains hot, with temperatures ranging from 80s to 90s during the day and 50s at night. Conventional volume is at peak production, expected to last through mid-April, followed by a steady decline into May. Organic production has concluded for the season, and the supply gap will persist until August. Some growers are currently pruning ranches, which may slightly reduce volume in the short term. Quality is excellent overall, with strong flavor, bloom, and appearance, although isolated issues of redberries, soft/leaking fruit, and shriveling are being reported. Due to high heat and rain events earlier in the season, Chilean production has finished, wrapping up earlier than expected. As we receive the final shipments, there are more issues with softness and shriveling, especially in prepack and bulk formats. However, the packhouse maintains clean packs with good color, bloom, and sizing. Weather has warmed up, with highs in the 50s–60s and lows in the 40s. Rain last week briefly slowed production, but the region is now bouncing back and entering peak organic production, which will last through April. Florida production is underway, with early-season fruit showing great quality, including some strong Jumbo volumes. Initial cooler weather and rain delayed the harvest and pushed peak estimates back by one to two weeks. However, production is now gaining momentum and is expected to peak in April, with a sharp decline in May. Only conventional fruit is being harvested in this region at this time.

Citrus

Oranges: Fruit remains excellent and offers great eating quality. Pricing on smaller sizes, 113's and 138's, continues to strengthen as the size structure is switching, but the overall market is stable. With the recent storms behind us, harvesting has resumed and good supplies will continue.

Lemons: Recent rains have slowed harvest over the past few weeks but with the weather improving, we will see good supplies and very good quality out of all growing areas in California. Smaller sizes are becoming more limited, while larger sizes remain readily available.

Limes: ESCALATED Overall yields continue to decline with sizing peaking on small sizes, including 200's, 230's, and 250's, with large size fruit having very limited availability. Quality and condition are better. Impending tariffs are causing instability in the market as many growers have slowed operations due to the uncertainty of financial implications.

Imports/Specialties: Blood Oranges are finishing for the season. Cara's will be finishing in about a month. California Mandarins, and Grapefruit are in good supply with very good quality.

West Coast Lettuce

Iceberg: WATCHLIST: Lettuce supplies are tightening up with transition starting. The market will be in flux, and we could potentially see some issues with quality and supplies in the coming weeks. We have had reports of wilting and weak tips affecting the outer leaves due to the heat.

Iceberg VA: Quality and supplies look good for now but there could be some supply and quality issues throughout transition.

Romaine & Romaine Hearts: WATCHLIST Romaine and Romaine heart supplies are good, but the market is trending higher due to increased demand. Due to the warmer weather, insect pressure has been reported. Organic Romaine hearts are still escalated due to limited supplies.

Romaine VA: Quality and supplies are good but there could be some quality and supply issues throughout transition.

Green Leaf and Red Leaf WATCHLIST: Overall quality and supplies look good but we could see potential issues on supplies and quality throughout transition.

Eastern and Western Vegetables:

Tariff Update: President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, are expected to be implemented on April 2nd.

Green Bell Pepper: Lighter supply available in Nogales and South Florida. Markets are higher and quality is mixed. Limited supply on larger sizes; stable volume on Medium and Choice Pepper.

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.

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. Jalapeño and Poblano were good this week. Caribes, Red Fresno and Shishito were shorter this week.

Eggplant: Lighter domestic supply continues, and quality is mixed. Good supply and excellent quality out of Mexico this week.

Slicer Cucumbers: Lighter supply crossing through Nogales and McAllen as well as Honduras. Quality is good and Markets were firmer this week due to transition; we expect to see better volume in two weeks.

English Cucumbers: Good supply available this week crossing from Mexico. Quality on new crop out of Mexico was good.

Pickles: WATCHLIST Lighter supply available crossing through Nogales and we may see some shorts on market buys as contracts are getting priority on volume. Quality is outstanding.

Green Beans: Excellent supply available, and quality is good crossing through Nogales as well as loading in Florida.

French Beans: WATCHLIST Vessel delays have led to reduced availability on certain pack sizes, resulting in increased demand. While quality and condition vary, they are generally good overall. Pricing remains mostly stable, and there continues to be a strong supply of French beans from Mexico.

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

Herbs: ESCALATED Basil's supply and quality remain marginal out of all growing regions due to the ongoing cold weather and rainfall. Additionally, Tarragon and other herbs continue to be affected by the same weather conditions. Supply is expected to improve within the next two weeks, pending more favorable growing conditions. Arugula and Cilantro are also in limited supply due to frost damage, resulting in small, uneven bunches, purple stems, and mechanical issues. Some growers are implementing prorating because of these challenges.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Marginal	USA
Basil	Very Limited	Marginal	USA/MEX
Opal Basil	Very Limited	Marginal	USA
Thai Basil	Very Limited	Marginal	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Limited	Marginal	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

Stable supplies from Guatemala, cantaloupe pricing continues to settle as do the honeydew. We may see some lighter volume later in the month as easter demand increases at retail.

Cantaloupe: Cantaloupe arrivals continue to show optimum quality characteristics with very nice higher color fruit. Sizing will be peaking on reg 9s followed by jumbos then 12s. With increased supplies there should be a good percentage of all sizes to work with. Internally brix levels are maintaining a solid range of 13-15% with an excellent flavor profile.

Honeydew: Honeydew production from Honduras continued to peak over the past week but will see a rapid drop from new arrivals over the next seven days as they begin to gap. Sizing has been peaking on 5/6s which is allowing for all orders to be covered without issue. Some Honduran fruit has had some age on it from being in storage but is quickly being rotated out. We expect to see increased numbers begin by this coming Friday, which is highly anticipated from what has been in the market for the past few weeks. Brix levels are expected to be mostly in the 12-14% range based off post-harvest QC reports.

Watermelon: Seedless watermelons continue to move higher with less fruit from both Guatemala and Mexico over the past two weeks. Demand is finally surpassing supply, which is pushing the market close to the \$30 level on cartons and \$300 on bins with limited arrivals expected.

Mixed Vegetables

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Artichokes: Supplies and Quality are both good.

Asparagus: ESCALATED Caborca/San Luis volume has remained low due to rain and high winds in the growing region. Markets continue to be more active with decreased volume from Mexico. Markets have seen considerable increases due to lower volumes available. Markets are expected to continue to increase over the coming weeks.

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

Broccoli/Broccoli Crowns: WATCHLIST Quality and supplies look good. Floret mini's are still tight, and Florets and Crowns are tightening up a bit. We could see issues with supplies and quality over the next few weeks. We are watching out for the effects of the heat on the fields.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality looks good, and most growers are looking good on supplies. We will keep this item on the Watchlist as we go into transition.

Brussels Sprouts: Quality and supplies look good.

Carrots (JUMBOS, MEDIUMS and CELLOS): The Desert growing regions have started with good supplies and very good quality. Expect steady supplies through the end of the desert season which will run into late April or early May.

Cauliflower: WATCHLIST Supplies are okay right now. The heat helped out with the remaining crops in Yuma, but we could see that change as everyone makes their way into Salinas.

Celery: Quality and supplies are looking good.

Corn: Stable supply and good quality available this week out of Mexico and Florida.

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 market are steady.

Green Cabbage: WATCHLIST Supplies and quality look 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: ESCALATED Pricing is still escalated in some markets. Quality is good but supplies are still light with some growers. The market remains very active.

Spinach: ESCALATED Supplies and quality are good. We have seen some reports of weak texture, discoloration, wilting and there have been some initial reports of some insect damage.

Snow Peas and Sugar Snaps: Guatemalan production of snow peas and sugar snaps remains steady; however, quality issues may persist due to ongoing humidity in the growing regions. Mexican production of snows and sugar snaps continues to be stable, with no major concerns reported.

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 taking place until May. Even then, there may still be some left over product 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 also are expected to have a lot of product. So 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 staying 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:

Tariff Update: President Trump has now confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement), including produce, are expected to be implemented on April 2nd.

East Coast

- Round and Roma Tomatoes: ESCALATED Our growers are now harvesting on the backside of the Winter crop resulting in very low production numbers. We are seeing this across the entire Florida crop and markets are much higher this week. We will see lighter volume until the spring crop starts in 3 weeks. Quality is good.
- Snacking Tomatoes (Cherry, Grape and Medley): ESCALATED Lighter supply and higher demand has put upward pressure on fob pricing this week on all domestic snacking tomatoes. Quality remains good.

Mexico

- Round and Roma Tomatoes: Lighter supply in Florida has driven demand to McAllen and Nogales pushing the fob market higher. This combined with a dip in production out of Sinaloa has pushed markets higher overnight. We expect this to continue for the next few weeks until Sonora begins daily production. Quality is fair.
- Snacking Tomatoes (Cherry, Grape and Medley): Lighter supply and higher demand has put upward pressure on fob of grape tomatoes, Cherry tomatoes and Medley tomatoes were flat this week. Overall quality has been good on the entire category.
- Tomato on the Vine: Lighter Volume available this week.

Other Fruit:

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

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

The Bartlett Crop out of the Northwest shows 3.8 million shipped last season vs a projected 2.9 million this year for a 14% decrease. It's not substantial in terms of overall volume, but it's still a factor. The cold temperatures will affect the grade, so more Fancy's will be packed than normal. Because the crop is smaller, the size profile has increased by 1 to 2 sizes. Barts to finish by the end of February/beginning of March.

Anjous report at least a 30% total decrease, or 1.85 million boxes less than last year. Also, out of the Wenatchee Valley, there will be more fancy and, for the first time in many years, a 3rd grade Anjous packed. When we start to pack Anjous— this will be your value pear. Anjous to start the week of September 16th, and if growers make it through June, I will be surprised.

Red Anjous are down 7% or 47,000 boxes, so it is nothing dramatic like the others. The question on Red Anjous is whether or not we will see smaller pears such as 120/135cts. Red pears are supposed to be 1 to 2 sizes larger out of the PNW. Red pears have started with Starkrimsons and will transition into Red Anjou from November through May.

Bosc are down 63% out of the great Northwest, or 1.38 million boxes. This variety was mostly affected, and markets will be much higher than in previous years. Bosc has slowly started with a potential end date last January/middle of February.

Pomegranate: Limited availability.

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

Cherries: Limited Supply Available.

Tree Fruit: Improving supply on Offshore Peaches, Plums and Nectarines available.

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

Quince: Limited supply available this week.