Weekly Market Review
March 21, 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.

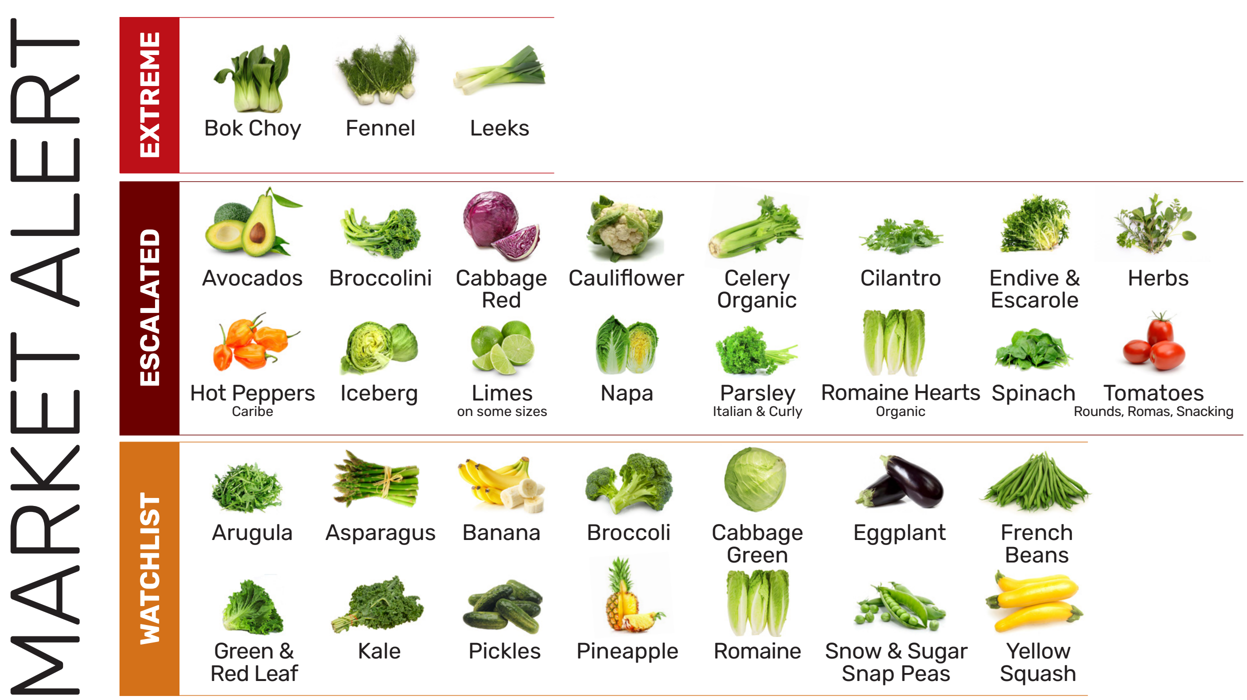
Markets are much tighter this week on **tomatoes** as we start the transition from the winter crops to spring. Tomatoes out of Florida will be tight for the next three to four week which is pushing buyers west to Mexico. Already short on supply due to the transition, Mexico will see much higher prices this week and lighter supply, particularly on **rounds**. We are also seeing short supply on **Yellow Squash**, premium sized **Green Bells, Pickles, Shishito** and **Caribe Pepper**. 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 industry supply remains tight following limited border crossings last week and the national holiday in Mexico on March 17. Demand is particularly strong for 60s and smaller, with prices elevated across all sizes. In Mexico, a significant portion of small fruit is staying in the domestic market ahead of Lent and Easter, while larger fruit remains scarce and commands a high premium. The market also continues to see a high percentage of Grade 2 fruit, a trend that is expected to persist. With Easter and Cinco de Mayo approaching, inventories will remain tight, and prices are likely to stay elevated into May. California harvests are expected to ramp up, improving availability by early April. As Peru and Colombia become more prominent in the market, some stability is anticipated during the summer months.

Transition has started and you will see growers moving into Huron, Oxnard and Salinas. The weather has been a constant challenge in Yuma, but it looks like the warmer weather is moving in not only in Yuma but also Salinas. We have a heat advisory in effect for Yuma that will begin this Sunday. The temperatures will reach the high nineties throughout all next week. This can cause increased insect pressure, mildew, internal burn and crop fatigue. We will not know the full extent of the damage until the weeks following. This will be something all the growers will be keeping an eye on and trying to navigate 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.

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 to continue to rise and yields continue to decrease while growers are making their transitions. **Cauliflower** has also tightened up and that market is already 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 that. To add some good news, **Broccolini** has really improved. Those supplies and quality should continue to improve as we get into Salinas, but **Endive, Escarole, Cilantro**, and **Spinach** remain escalated, with supply shortages driving the market.

Bok Choy, Fennel and **Leeks** remain at the extreme trigger level. **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. Aphids are likely to target **Arugula, Kale** and **Cilantro** so we will be monitoring those items closely. We will keep an eye on those items and all leafy greens and keep everyone updated on any issues. Growers will, as always, do their best to prevent any supply gaps and will try to get everyone the best quality but some issues should be expected in the coming weeks.



FRUITS & VEGETABLES

Avocados: ESCALATED Last week closed with strong volumes, reaching 58M pounds across all countries of origin. Mexico's volume increased by 42%, with a robust harvest continuing into this week. The U.S. market is actively competing with Mexico for small fruit as domestic demand in Mexico rises due to Lent, which continues until Easter (April 20). As anticipated, due to much-needed rainfall, California's harvest was limited last week. Year-to-date rainfall stands at 80% of the average in Central California and 43% in Southern California. While the upcoming week is expected to have clear skies, many remain hopeful for additional rainfall in the weeks ahead. Mexico and California started the week with solid numbers, and current projections indicate volumes will exceed expectations. Mexico's main crop dry matter is averaging 33.2% while California's crop dry matter is averaging 24%. Looking ahead, April will bring larger, more consistent volumes, with supply expected to remain strong through September out of California.

Table Grapes: Stable supply is available on whites, reds, globes and black varieties, and we hit a stable production cycle on grapes from Peru and Chile. Quality is good.

Pineapples: WATCHLIST Pineapples will remain tight and are not expected to improve until the end of February, with peak volume hitting in May. Flexibility in sizes will be necessary over the next several weeks.

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.

BERRIES

Strawberries: Overall supplies continue to tighten as Mexico's volumes decline due to seasonality. Strawberry availability in the West remains limited following previous rainfall, which has led to increased rain-related quality issues. Mexico's production is steadily decreasing, with high temperatures and fluctuating conditions causing uneven ripening, while many smaller growers have already ceased operations, and fruit sizes are trending smaller. Bruising and soft skin remain key quality concerns for shipments. Florida's production remains steady, despite fluctuating temperatures and light rain, though no significant damage has been reported. Cooler weather may slow production in the short term but could enhance fruit quality over time. As weather conditions stabilize in California, production is expected to improve gradually, though limited fruit availability in the West is likely to persist for the next 7-10 days. Across all regions, growers remain proactive in managing quality concerns and adjusting harvesting strategies to optimize supply and maintain fruit integrity.

Blackberries: Blackberry quality remains strong, with medium to large sizing, good sheen, and firm fruit. However, some challenges persist, including red cell regression, attached calyx, and occasional soft or leaking berries. Volume is holding steady at peak levels through July, though a slight decline is expected toward the end of February. Organic production is tapering off earlier than anticipated as the season nears its conclusion.

Raspberries: Raspberry quality remains strong, with vibrant red color, good firmness, and mostly medium-sized fruit, with some larger berries mixed in. While some overripe and crumbled fruit is present, crews are diligently working to exclude them from packs. Volume is expected to remain at a consistent peak through April, with a slight decline anticipated toward the end of February. Organic production is performing well, with steady availability expected as we move into peak production, ensuring decent supply through March.

Blueberries: In Mexico, warm temperatures persist, with conventional production at its peak, expected to last through mid-April before steadily declining into May. Organic production has concluded for the season, with a supply gap anticipated until August. Quality remains excellent, though some redberries, soft fruit, and shriveling are being observed. Chile is wrapping up its season earlier than expected due to high heat and rain events, though arriving fruit has shown excellent quality, size, and color. Conventional shipments will continue through March, with limited open-market availability due to reduced Chilean estimates. Organic shipments will also remain consistent through March. Oxnard is seeing favorable weather, and organic blueberry production is ramping up with excellent size, flavor, and bloom. Volume is increasing quickly, with peak production expected in late March. Florida is set to begin conventional blueberry production this week, though recent cool and wet weather on the Mid-East Coast has slightly reduced early-season estimates. Despite this, the region is expected to start strong, with good quality and solid Jumbo berry volume.

CITRUS

Oranges: Quality from California remains excellent with very good supplies. Pricing on smaller sizes, 113's and 138's, continues to strengthen as the size structure is switching, but the overall market is stable. Good supplies will continue.

Limes: ESCALATED ON SOME SIZES Overall yields continue to decline with sizing peaking on small size, including 200's, 230's, and 250's with large size fruit having very limited availability. Quality and condition is better, and the fruit represents less defects, especially oil spots, which has been the primary issue previously. Expect higher pricing into next week.

Lemons: Good supplies and very good quality out of all growing areas in California.

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: ESCALATED Lettuce supplies and quality look good, but with transition on the horizon the market will be in flux, and we could potentially see some issues with quality and supplies in the coming weeks.

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

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

Romaine, Romaine Hearts: WATCHLIST Romaine and Romaine heart supplies are good, but the market is trending higher due to increased demand. With the spring weather coming in, insect pressure will start to be a factor with these items. Organic Romaine Hearts are already escalated due to limited supplies.

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

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Lighter supply available in Nogals and South Florida. Quality is mostly good.

Color Bell Pepper: Good supply available in Nogals and South Florida. Quality is mostly good.

Mini Sweet Pepper: Supply stable this week loading in Nogales.

Mixed Chili Pepper: ESCALATED Supplies in general are good across most varieties out of Mexico: Jalapeño, Caribes, and Poblano were good this week. Caribes are the shortest this week.

Eggplant: WATCHLIST Lighter domestic supply 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. Quality is outstanding.

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

French Beans: WATCHLIST Production and quality are good. Vessel delays continue to decrease shelf life. Good supply of French beans out of Mexico.

Zucchini/Yellow Squash: WATCHLIST Good volume and quality availably 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.

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.

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.

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.

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

MIXED VEGETABLES

Artichokes: Supplies and Quality are both good.
Asparagus: WATCHLIST Caborca/San Luis volume has dropped this week with rain and high winds in the growing region. Markets are more active with decreased volume from Mexico. We will likely see higher pricing in the next 7-10 days.
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 some growers are still short on those. WE have added this item to the watchlist since transition is right around the corner. We could see issues with supplies and quality over the next few weeks.
Broccolini and Sweet Baby Broccoli: ESCALATED Quality looks good, and most growers are looking very good on supplies.
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: ESCALATED Supplies are very good, but we have had some reports of weaker texture causing mechanical damage.
Celery: Quality and supplies are looking good. Organic Celery is triggered due to light supplies.
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 (Curly, Italian): 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: WATCHLIST Guatemalan production of snow peas and sugar snaps has declined due to high humidity in the growing regions, which may lead to quality concerns. Meanwhile, Mexican production remains steady, providing a more reliable supply.

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 leftover 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 are expected to have a lot of product. So, in the first 2 months of Q2 (April/May) there is not presently a lot of optimism. However, June is a bit of a wildcard. At that point, Texas is done, the Northwest is done, Southern Cal will be mostly finished, and we will be exclusively into New Mexico and Central California at that time. It is basically a fresh start during that 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:

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 the demand to McAllen and Nogales pushing the fob market higher. Overall quality is good on both verities. We expect good markets for the next three weeks.

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.

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.

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 Because the crop is smaller, the size profile has increased by 1 to 2 sizes. Barts to finish by the end of Feb./ first part 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 – I will share pics of 3rd grade, 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.

DAIRY:

The U.S. probably has enough power to "win" a trade war with one or two major countries at a time, but probably not with the whole world at the same time. The odds that we get some kind of negative demand shock, either on exports or in the domestic market are increasing which is making me more bearish on Q2/Q3 U.S. prices. Foot and mouth was found on a farm on the Hungary/Slovakia boarder after the case in January in Germany. Early viral sequencing suggests the two cases are not connect-ed. Hungary+Slovakia only account for 1.6% of EU27+UK production and probably won't have much impact on trade flows, but a second case in 3 months is concerning.

EGGS:

National FOB shell egg weighted average prices are steady to higher for caged white eggs with only Extra Large well tested. The undertone is lower. Retail and loose egg demand ranges light to instances moderate. Offerings are light. Supplies are mixed, mostly moderate. Market activity is moderate. California weighted average delivered prices are only lightly tested for Jumbo and Large. The undertone is lower. Demand into retail channels is light to moderate. Food service demand is light. Offerings are light. Supplies are light to moderate. Market activity is slow to moderate.

BEEF:

Retail demand faces several pressures, including record-high retail prices, economic uncertainty, stock market volatility, and the associated wealth effect. These factors could weigh on consumer spending, particularly for higherpriced cuts. April 2 is the latest deadline for tariffs on Canadian and Mexican imports. Additionally, by April 1, the Commerce Department is set to receive findings regarding non-reciprocal trade agreements with Australia and Brazil. Both countries currently impose tariffs on U.S. goods, and while not certain, they could face similar trade actions.This development is significant, as Australia and Brazil are key sources of lean grinding materials, which have grown increasingly important as domestic lean beef supplies tighten. As for this week, Cattle weights are declining seasonally but remain above both last year's levels and the five-year average.Ribs and loins are seeing increased buying interest this week. Futures markets have surged over the past two weeks, with the April contract rising 7.5% to close at $205 last night. Cutout values are called steady to higher, with decent availability across all cuts. With per-head packer margins still in the negative $100–$120 range, packers will likely rely on middle meats to drive profitability heading into April and peak grilling season.

CHICKEN:

Prices are firm for WOGS with three pound and heavier sizes moving well; whole fryers are at least steady. Supplies are moderate for whole fryers; tight and wanted for WOGS. Demand is moderate to good approaching the weekend. Floor stocks are moderate and clearing satisfactorily. Market actvity is mostly active. In the parts structure, prices continue to trend firm for breast cuts; steady to firm for tenders and dark meat cuts with legs, thigh and leg meat moving well; wings are steady to weak with the jumbo and small sizes moving into a better balance mainly due March Madness. Supplies of b/s breasts are short of trade needs; light to moderate for tenders, fronts and bone-in breasts, dark meat cuts are moderate with legs, thighs and leg meat in close balance. Wings are moderate to heavy with the small size wings moving into a better poition. Demand is moderate to good. Market activity is moderate to instances active.

PORK:

The expected harvest this week is 2.5 million head. As we approach the implementation of potential tariffs, pork export markets remain remarkably calm, with many participants taking a "wait and see" approach. Hog prices and futures are lower this week. As mentioned last week ribs and bellies are supported by freezer demand. Loins are called steady this week. Butts have good retail interest and that should build as we approach April because they represent a good red meat value when compared to other choices. As for tariffs, the situation is complex. On one hand, there are the direct effects of tariffs themselves. However, it's also essential to consider how tariffs influence currency values, which can impact trade competitiveness. Additionally, consumer sentiment plays a significant role, as uncertainty can shift demand patterns for a given commodity.

TURKEY:

The market on frozen 8-16 lb. hens and 16-24 lb. toms is steady to firm. Demand on frozen Grade A 816 lb. hens and 16-24 lb. toms is light to moderate, best for deferred shipments. Offerings short to light. Frozen basted equivalent 8-16 lb. hens offered at 107.00-118 and 16-24 lb. toms 107.00-119 cents FOB for current deliveries. No trading reported.

The market on fresh and frozen tom breast meat is steady to firm. Demand moderate to good. Offerings short to light. The destrapped tenderloin market is steady to firm. Demand moderate to good. Offerings short to light. The market on white trims is steady to firm. Demand moderate to good. Offerings short to light. Further processed demand light to moderate.

The consumer sized breast market is steady to firm. Demand light to moderate. Offerings light. Institutional sized breast markets are steady. Demand light to moderate. Offerings light. The market on hen and tom parts is steady to firm. Demand moderate to good. Offerings short to very light. The thigh meat market is steady to firm. Demand moderate to good. Offerings short to very light. Hearts, livers and gizzards steady. Demand light to moderate. Offerings light. Mechanically separated turkey is steady to firm. Demand moderate to good. Offerings very light to light. Trading slow.

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