



COMMODITY FORECAST

<p>Apples</p>	<p>As we move into the next quarter of the Washington apple season, the industry has continued to revise crop estimates downward. Current projections place the crop near 130 million boxes, compared to early-season expectations of 140+ million boxes. The adjustment has largely been driven by lower-than-anticipated pack-out percentages across several varieties, reducing the overall number of fresh market cartons available. At this point, the crop is estimated to be roughly 8% smaller than last season, which has begun to tighten the supply picture as the storage season progresses. Sizing continues to be one of the primary challenges this season. The crop skewed larger overall, and smaller sizes that were packed (113–175 ct) are being heavily directed into retail bag programs, which are currently paying a premium over traditional tray pack markets. As a result, foodservice and wholesale channels are seeing tight availability on the smaller counts. Washington will continue to ship fruit from controlled atmosphere storage with good overall quality, but the combination of reduced pack-outs, smaller storage inventories, and strong retail bag demand is expected to keep markets firm.</p>	<p>Avocados</p>	<p>Mexico continues to harvest aggressively to keep up with rising demand. Growing conditions remain excellent with warm weather and strong fruit sizing supporting high volumes. Demand has recently shifted toward 60ct fruit, as it currently offers retailers the best price per piece. Mexico is harvesting roughly 17–25% in 60ct, and if this trend continues, we could see 60s priced higher than 48s. If Mexico maintains its current harvest pace, we may begin to see a decline in availability by May. California is expected to start its season in April, though actual harvest timing will depend heavily on market conditions, as growers may hold off if pricing is too low. Mexico has about 15 weeks left in the season and has already harvested approximately 75% of the crop. If demand remains as strong as it is now, the season could shorten. Looking ahead, Peru programs are expected to begin in June.</p>
<p>Asparagus</p>	<p>Asparagus production in Caborca is nearing the end of its seasonal window, which will begin to tighten overall availability. Peruvian supply is expected to ramp up as a replacement, though early arrivals tend to skew toward smaller sizes and may not fully meet demand for larger grades. Domestic production will begin to come online shortly and is expected to provide a consistent supply through June and into July, helping to stabilize the market as we move into the late spring and early summer period. However, this remains an El Niño year, which introduces additional risk. Weather volatility, including excessive rain or temperature swings, could impact yields, quality, and harvest timing across multiple growing regions. As a result, while supply transitions are underway, markets may remain somewhat volatile, and flexibility on sizing and sourcing may be necessary in the coming weeks.</p>	<p>Bananas</p>	<p>We expect tighter supply through Q2, as demand has been surging through Q1. Upward pressure on growing costs, low yields, and transportation costs are keeping prices at record highs. We do not foresee any shortfalls but do expect to see less market product available for spot business.</p>
		<p>Blackberries</p>	<p>Blackberry volumes have been light throughout Q1 but are expected to increase by mid-April. The domestic season is anticipated to begin in late May, with volumes starting light and not reaching peak levels until August. Overall quality has been excellent.</p>
		<p>Blueberries</p>	<p>Freeze damage in the Southeast has resulted in a slower start to Q2, with April expected to be a limited supply month for blueberries. Supplies are projected to improve quickly in May and June as production transitions to stronger volumes out of Georgia and California. Florida will have a smaller crop this season, beginning in late March and running through mid-May, while Georgia is expected to have a shorter season from late April through the end of May. California’s Central Valley harvest is anticipated to begin in early May, providing solid volume through mid-June.</p>



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Broccoli, Broccoli Crowns and Brocolini	As we head into transition for Q2, supplies are tightening up on broccoli. The fields are clearing out in Yuma, and while some growers are filling orders with MX product, there may be very tight supplies until everyone is settled into Salinas. Brocolini will also remain limited until mid-April.
Cabbage - Red and Green	As we head into Q2, cabbage is looking good. Quality and supply should be good as long as the weather cooperates.
Carrots	Q2 will remain challenging for carrots. For April, we will continue to see challenges on larger sizes, particularly cellos and jumbos. Acreage harvested per day remains limited, which is impacting overall availability and sizing. May and June growers will transition, and we expect production to improve and supplies to get back to normal.
Cauliflower	Cauliflower will have the same issues as broccoli going into Q2. We will see limited supplies and possibly an escalated market. We should see quality and supplies improve once everyone is settled into Salinas.
Celery	Celery is finally recovering. Celery looks good for Q2. Supplies are good right now, with most growers utilizing Oxnard through May. Once we get into June, some growers will transition into Salinas, and we may see some limited supplies as we roll into Q3.
Color Bell Peppers	Short supply is expected out of Mexico until we get back into California sometime in late June.
Cucumbers	Light supply is expected until May, then we should see relief with Georgia and Baja ramping up production.
Eggplant	Light supply is expected until May, then we should see relief with Georgia and Baja ramping up production.
French Beans	Supply is expected to be favorable as we move into the upcoming period.

French Beans (cont.)	However, recent cold weather and potential El Niño impacts introduce uncertainty, and conditions will need to be closely monitored as they could affect production and overall availability.
Grapes	Supply is expected to tighten out of Chile over the next month, particularly on greens. We may see some delays and supply gaps between offshore and Mexico, but we will assess as we approach June. Quality remains strong on reds; however, greens will start to see amber as well as other imperfections as the season winds down.
Green Beans	Supply will continue to be a challenge through April, as the winter crops have been put under extreme weather pressure throughout the entire season. New crop is expected to begin in Georgia in May.
Green Bell Pepper	Markets will remain light in the East due to the freeze in Florida earlier in the year. We do not expect any relief on the East Coast until Georgia starts in early May. On the West Coast, supply will remain light out of Mexico, keeping markets firm. We do not expect relief in the West until early May and until the transition to California starts.
Green Leaf, Red Leaf and Butter	Quality and supplies look good as we head into Q2. No quality or supply issues are foreseeable, but again, as with the lettuce and romaine, transition could cause problems with quality and supplies.
Green Onions	Green onions are finally starting to see relief. Quality and supplies look good for Q2. No foreseeable issues as long as the weather cooperates.
Iceberg Lettuce	For Q2, iceberg will be transitioning into Salinas. A few growers will be running out of Huron, but April always poses challenges in quality and supplies. Growers will do their best to cover the contract averages, but April may be a bit of a roller coaster. You can also expect the market to escalate due to limited supplies. Once we get through April and everyone is settled into Salinas, things should improve as we get into May, as long as the weather cooperates.



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Lemons	Lemon volume is not expected to decrease in Q2. However, the grade ratio will shift. While fancy grade averaged around 70% from January to March, it is expected to be around 50% in April, 40% in May, and 30% in June, as harvesting will be in District 2 during May and June. The size structure is noted as very large and growing, with sizes expected to peak at 115/140. Small fruit sizes are anticipated to be tight, and market pricing is expected to reflect this. The anticipated grade breakdown is 50% fancy, 30% choice, and 20% standard.
Lettuce - Spring Mix, Arugula, Baby Spinach	As we head into Q2, we are keeping an eye on the insect pressure on these items. We will likely see some quality issues as we go through the end of March and early April. Once we are transitioned into Salinas, things should look good for the remainder of Q2.
Limes	Supply will be light over the next 3–4 weeks, as cooler weather and rain in January have impacted the current growing regions. We will see size issues, such as limited large fruit, over this timeline. Once we get into May, we do anticipate a significant improvement in overall supply and quality.
Melons - Cantaloupes & Honeydews	The offshore season will wrap up in mid-May, then transition to the desert, followed by California in early July. Q2 should run smoother as suppliers are expecting more consistent cantaloupe production, and honeydews stabilize by the end of April.
Melons - Watermelon	Light supplies are expected now through April but should improve as we move back to Florida in April and May. Since the freeze in Florida, growing conditions have been favorable, and the outlook on supply and quality is looking up. Until Florida is at peak production, most supply will come out of Mexico, with the offshore season ending in March. Arizona and California will start up in May and will take pressure off.
Mixed Items	Supplies and quality are looking good for Q2. No foreseeable issues on the horizon.
Mushrooms	Promotable supply is anticipated through the next quarter, barring any unforeseen production interruptions.

Onions	The U.S. onion market enters the second quarter with steady supply and moderate demand, supported primarily by Northwest storage onions from Idaho and Eastern Oregon. Yellow onion pricing remains competitive, while white onions continue to hold a premium due to tighter supply. As spring progresses, the market will begin transitioning into new crop production from California, followed by New Mexico, while Mexican imports continue supplying southern distribution channels. Overall, the market is expected to remain balanced through Q2, with pricing largely dependent on the pace of storage shipments and the timing of new crop production entering the market.
Oranges	CA Navels are expected to be available through June. Mid-season varieties are currently peaking at medium to large sizes (72s/56s/48s), with late-season varieties trending even larger (48/40/56). Small fruit sizes (88s and smaller) are anticipated to be limited from April through June. Valencia harvesting is set to begin in mid to late April, with the domestic season running from mid-May to October, transitioning back to CA Navels. Current fruit is peaking on 72/56, with little expected relief for small size demand. The crop is estimated to be up 10–20% this year. Light harvesting is expected to begin in early to mid-April, with smaller sizes available at the start. While the overall crop volume is up compared to last year, it is expected to trend toward larger sizes as the harvest progresses, similar to the navel size structure.
Other Citrus Items	Caras are projected to finish by the end of May. Fruit size has been increasing, with current peaks at 72/56/88, and further growth is expected. Small fruit will be limited, and sizes are expected to remain tight until the season concludes in mid to late May. Minneolas are expected to conclude by the end of April, with flavor profile currently at its peak. Sales will continue through April and into May, with the crop projected to finish by the first week of June, or possibly earlier.



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<p>Other Citrus Items</p>	<p>Blood oranges are nearing the end of their harvest for the Moro variety within the next month and will transition to the Sanguinelli variety. Good size availability is expected, with fruit extending into June. Heat in the coming weeks may lead to softer mandarins in April, potentially impacting quality. This is expected to be an industry-wide issue, and customers should be informed accordingly. The domestic mandarin crop is planned to finish by the first week of June. Texas grapefruit will finish in early May, after which shipments will transition to California. Peak sizes in Texas for April are 40/48 count. Grapefruit harvesting in California will continue through mid-September. Sizes are peaking at 32/37, indicating large fruit. The crop is estimated to be down 10–20% compared to last year. New crop Star Ruby grapefruit harvesting has begun, with peak season anticipated from April to June.</p>	<p>Snow & Snap Peas</p>	<p>Supply is expected to improve as we move into Q2, which is typically a stronger production period for peas. However, ongoing El Niño conditions could introduce weather-related volatility that may impact supply through the summer months. Overall, while outlook is favorable, market conditions will need to be monitored closely.</p>
<p>Pears</p>	<p>The Northwest pear volume will be tested with a USDA bid to buy up to 500 truckloads of pears in the months of April and May. This could increase market pricing and make it difficult for the supply to last the rest of the season. Quality remains good on the remaining storage crop.</p>	<p>Strawberries</p>	<p>Strawberry volumes in Q2 are expected to see a short-term dip during the first week of April due to recent and ongoing heat, with recovery anticipated by the second week of April. Despite this temporary decline, supply will remain sufficient to fully cover contract commitments. Strong volume is expected from mid-April through early June, supported by peak production before tapering as the Santa Maria spring crop concludes. As Santa Maria winds down, Salinas and Watsonville production will ramp up, with the Santa Maria fall crop expected to begin in mid-July. Recent heat has impacted quality, leading to increased field culling to maintain pack standards; however, quality is expected to improve by the second week of April.</p>
<p>Potatoes</p>	<p>Idaho russets will remain in good supply and quality in Q2. The overall size profile this season has leaned toward larger potatoes, and some suppliers are expecting smaller spuds to be tighter. Supply will still exceed demand on most sizes to finish out this crop.</p>	<p>Tomatoes - East Coast</p>	<p>Supply will be short out of Florida for the next month due to the freeze earlier in the year, which destroyed nearly 80% of Florida winter agricultural production. We are hoping to see some relief by mid to late April. We do not expect to see normal markets until we complete the transition to Georgia and South Carolina in late May.</p>
<p>Raspberries</p>	<p>Raspberry volumes have remained light throughout Q1 but are expected to increase by the third week of April, with volumes projected to double by early May. The domestic season is anticipated to begin in late May.</p>	<p>Tomatoes - West Coast</p>	<p>The winter crop out of Sinaloa may end earlier than normal due to virus pressure and significant crop losses. We will see production in Sonora, but not enough to compensate for the losses in Sinaloa. Expect shortages and high markets until transition to areas like Baja and Torreón ramp up production sometime in May.</p>
<p>Romaine and Romaine Hearts</p>	<p>Romaine and romaine hearts will be transitioning into Salinas as we go into Q2. As with iceberg, supplies will be limited and quality will potentially have problems. Transition is always riddled with these issues, but once growers are settled into Salinas, things will improve.</p>	<p>Yellow Squash & Zucchini</p>	<p>Good volume on green is expected to continue through the next quarter. Yellow squash will remain tight until we transition to South Georgia and California in late April. No supply interruptions are expected, barring any unforeseen weather-related pressure.</p>