MARKET UPDATE FOR MAY 9, 2022

**** THIS WEEK ** ASPARAGUS**- Warming temperatures will bring the volume on quickly this week. We should see our first shipment by Wednesday of this week. -Hayes Haven Farm, Tillsonburg
**** THIS WEEK ** FIDDLEHEADS**- Fiddleheads have started and will also be available by Wednesday. – Forage Girl Farms, Port Colbourne.
**** NEW ** RAMPS/WILD LEEKS**- The **very short** Ontario ramp season has started. Grab these garlicky, onion flavored plants quickly as their season is very short. Sold in 1lb bags. – Various Growers
**** NEW ** HOTHOUSE TOMATO**- Ontario beefsteak tomato have started. There continues to be red vine and heirloom. See below for full details. – Nature Fresh Farms, Leamington
HOTHOUSE PEPPERS- Red, yellow and orange hothouse pepper production continues to ramp up. Pricing has eased as volume increases. – Nature Fresh Farms, Leamington / St. Davids Hydroponics, St. Davids
EGGPLANT– Ontario hothouse grown eggplant is now available, with light supplies and outstanding quality.
RHUBARB- Ontario greenhouse rhubarb continues light supplies. Pricing will remain high until we transition to field grown in June. As supplies increase, pricing will come down.
WAX TURNIP (RUTABEGA) – Ontario rutabaga continues with good supplies. – Various Growers.
CARROT- Ontario carrots orange carrots are finished for the season. We will continue to have heirloom multi colored carrots for a while. – Gwillimdale Farms, Bradford
ONION- Yellow cooking onions continue but are finishing up quickly. – Gwillimdale Farms, Bradford
MUSHROOMS- Mushrooms markets continue to be extremely active due to the high demand at retail and labor shortages at the farms. This will affect availability and quality on foodservice items, particularly button mushrooms. – Leamington
POTATO– Red, white and Yukon Gold potatoes are available in "A" and "B" sizes.
CABBAGE– Green and red cabbage continue. Savoy is done. Supplies are quality are good. Prices are steady. – Saliba Farms, Acton
APPLES–McIntosh, Empire, Cortland, Red Delicious continue. Royal Gala and Golden Delicious are finished for the season. Prices remain steady. – Norfolk Fruit Growers – Simcoe / Great Northern Orchards
HOTHOUSE LETTUCE- Hydroponic boston supplies are steady with very good quality.
ENGLISH CUCUMBERS– Markets remains steady with Ontario cucumber demanding a premium. Quality is very good. See below for full details. – Great Lakes Farms, Leamington
HOTHOUSE STRAWBERRIES- Ontario hothouse strawberries are available in light supply – Nature Fresh Farms, Leamington

MARKETS TO WATCH: AT A GLANCE

Peeled Garlic: Supplies from China continue to be very tight. As well China is finishing up old crop with new crop expected in late June. Quality is only fair with shorter shelf life. California market is tightening up as California supplies are finished.
Asparagus: Supplies are gapping as Mexican supplies are coming to a close. Oregon, Washington, Ontario and Quebec will take over supplies.
Avocados: Supplies are better this week coming out of Mexico. Markets are lower with better supplies, but this is expected to be short lived.
Green Peppers: Prices are slightly lower. Most growers out of Coachella are now online. Florida has good supply.
Blackberries: Steady supplies are now coming in from Central Mexico and Baja California.
Raspberries: Product is coming from Central Mexico and Baja Mexico. California Production is still a couple of weeks away.
Strawberries: We are past the Mother's Day pull and fruit is in much better supply.
Brussels Sprouts: Brussels sprout supplies continue to be very limited. The heat in Mexico has stunned the growth and has caused crew shortages.
Peeled Baby Carrots: Production on baby carrot packs is still lagging behind demand.
Cauliflower: Quality is very good with increased demand. The cauliflower market is strengthening and will remain active through next week.
Celery: Stronger demand has made this commodity active in the marketplace. Large sizing, twenty-four counts in particular has the best availability right now.
Limes: Lime prices continue to ease. There are weaker prices on small fruit (230ct/250ct) while large size fruit (110ct/150ct) is priced much higher. Expect this continued trend over the next several weeks.
Oranges: The navel season is winding down. Supplies remain very limited on 113's and 138's and some growers are harvesting Valencia's to cover orders.

Green Grapes: The green grape market is firm on both coasts. Some lots show ambering. Better quality is commanding a premium.
Red Grapes: Most of the distressed fruit has been dealt with causing the market to slowly rise.
Mushrooms: Supplies chain issues continue to cause a shortage of supply that will go into the summer.
Iceberg: This market has firmed up due to suppliers being caught up with production. Markets are poised to keep inching up over the next 7 to 10 days.
Cantaloupe: Imports in Florida should continue for another 3 weeks. Mexican fruit crossing in Nogales is priced lower than the central American imports. California should start late next week in the Imperial Valley.
Honeydew: Honeydews from central America will continue out of Florida for another 3 weeks. Good volume and quality crossing in Nogales now.
Seedless Watermelon: Market lower as volume from Mexico starts to ramp up.
Stone Fruit: Offshore stone fruit is finished except for plums. California has started with apricots, peaches, nectarines and cherries.
Onions: California is ramping up with supply. Texas is entering its last few weeks. Pricing on all sizes remains elevated.

VEGETABLES

GARLIC- The peeled garlic pipeline from China continues to remain unstable and pricing remains very high. We will soon be in transition from old crop to new crop, which starts in June. Supplies are very tight, with quality issues being seen on old crop product. Shipping costs remain very high and there are still delays every stop along the way. Until the logistics situation returns to normal, we can expect to have volatile supplies, potential quality issues and higher than normal pricing. **California:** California garlic continues to be light and growers are pro-rating and supplementing supplies with product from Argentina and Mexico. We expect this volatile market to continue through the summer.
ICEBERG- Iceberg markets are rising as supplies from Santa Maria/Oxnard and Salinas tighten this week. Overall yields are being reduced as more heads are exhibiting sun scald, wind burn, and disease pressure. Weights are averaging 40-44 pounds. Low nighttime temperatures have slowed maturation. Persistent wind has dehydrated some heads while increasing the occurrence of scarring and tip burn. Markets are poised to keep inching up over the next 7 to 10 days. The weather forecast calls for average temperatures into the weekend with no rain in the forecast.
ROMAINE / LEAF- The market continues to stay steady on romaine as well as green and red leaf. Good supplies will continue with romaine hearts. Common defects being reported include tip and fringe burn. This market is expected to turn around in the next few weeks. For this week, pricing is expected to stay competitive.
WEST COAST: SPRING MIX/BABY SPINACH/BABY KALE- Good supplies with quality overall fair to good with texture and size within specification. Look for this market to stay steady.
EAST COAST: ARUGULA / WATERCRESS– Watercress and arugula supplies out of Florida are very good with good quality.
BROCCOLI- Broccoli supplies continue to be very good in Salinas, Santa Maria and Mexico. Quality is very good. We are anticipating a slight increase in the market next week but currently the market will remain steady going into this weekend.
ASPARAGUS– We continue to experience a slight supply gap as Caborca, Mexico supplies are coming to a close. This is the time of year Mexico's growing areas will transition to the southern Baja region. Oregon continues with slow production/heat in the fields, causing lower than normal yields due to seeding. Guanajuato, Mexico is still scheduled to start the last week in May. Peruvian production continues to increase every week in the north and the south is still seeing cooler weather. The market continues to be very active with the transition. Airspace from Peru has been very limited with the Mother's Day flower rush. Look for supplies to be on the tighter side over the next few weeks. Markets of all sizes will be slightly elevated during this time. We anticipate prices to stabilize as local spring deals start across the country.
CABBAGE- **East Coast**: Cabbage continues to look beautiful from Florida. Market is a little high right now as storage crops begin to get low. **West Coast**: Texas continues with good supplies.
CAULIFLOWER– Quality is very good with increased demand. The cauliflower market is strengthening and will remain active through next week.
BEANS/PEAS- Previous cold weather is delaying the harvesting transition and resulting in low plant yields. Prices are up. Florida production is light and the Central and Eastern regions are finishing up. Northern Florida has low acreage. Quality is average with no major issues being reported. The Georgia season is behind schedule due to previous cold weather and replanting; expect production to start the week of May 15. Mexican stocks are limited as some growers on the mainland have finished the season. The California season will start mid-May; low volume is expected at first due to cold weather. Expect elevated markets over the next two weeks. We continue to see light supplies of flat pole beans and fava beans as well as very light supplies of yellow wax beans. English peas have also started. **Snipped**: Value-added trimmed green bean supplies are light with higher pricing. Snipped quality is very good.
CELERY- Celery supplies are more limited this week. Stronger demand has made this commodity active in the marketplace. Large sizing, twenty-four counts in particular has the best availability right now. Overall quality is fair with some reports of seeder ranging from 4-6". Celery is currently available in Oxnard and Santa Maria. Expect moderate supplies at best for this week.
EGGPLANT- There is steady supply out of Florida. Nogales supply is solid. Crop will run through the end of May into early June. Eggplant is now available out of Coachella. Georgia is about 3 weeks from starting.
MUSHROOMS- Quality is good, although **supplies of white buttons continue to be extremely short.** The market is steady at higher prices primarily due to a lack of labor, packaging increases and shortages in components of growing such as peat moss. We do expect this trend to continue well into the summer.
BRUSSELS SPROUTS- Brussels sprout supplies continue to be very limited. The heat in Mexico has stunned the growth and has caused crew shortages. Look for supplies to remain tight for the next few weeks. There is a limited supply of sprouts are being harvested in Santa Maria, California. Oxnard, California production is scheduled to start mid-May. Salinas Valley harvests will follow in early to mid-June. Prices are expected to remain elevated for the next two to three weeks until yields in Mexicali rebound.
FIELD PEPPERS- **Green Pepper**: There is steady supply from Florida, but Mexico is calling it quits and ending their season. Quality is not holding up, so many growers have stopped harvesting and shipping. California does have volume, and quality is holding strong. Florida is slowly coming to an end, and Georgia is still scheduled to start around May 15th. **Red Pepper**: The spring season is winding down in Western Mexico. Quality is hit or miss; some color and mechanical issues are being observed during the grading process. The Canadian greenhouse season is well underway with extra-large and large sizes being the most abundant. Florida produces a minimal amount of field grown red peppers. Expect markets to remain steady.
HOTHOUSE PEPPERS- Canada is in full production and picks remain very strong. Sizing is mainly XL and XXL. Quality is very strong. There is still product coming out of Mexico on the west coast. Quality is average. Into June, Canadian picks and quality are expected to remain strong. Big flushes are expected late May into June. West coast Mexican supply is expected to be done mid to late May. High tech Central Mexico supply is expected to start mid May and be heavy for the first 6 weeks. By July, we expect West Coast pepper production to be done. Central Mexico will continue to have good supply and quality, as will Canadian crops. Canada is expected to be the main player in the pepper market. Expect to see more large & medium pepper in the mix.

CORN- Florida has good volume and excellent quality after a slow start to the season. South Georgia will ramp up in approximately 3 weeks. Load volume is available. In California, corn has excellent quality. Promotable volume is available for the next two weeks.

ASSORTED CHILI PEPPERS- We will continue to see marginal quality and light supply out of Florida. In McAllen and Nogales, prices remain firm this week, mainly due to transition. We hope to see better volume over the next several weeks as newer regions ramp up production.

CARTON BAKING POTATOES- Canada held 19.2% more potatoes in storage on April 1 than year prior. It is the largest April 1 inventory since 2016. Current holdings exceed year-earlier levels in all provinces except Manitoba, Alberta, and British Columbia. PEI and New Brunswick account for 90.7% of this year's increase. The largest gain is in potatoes intended for table potato use, which are up 47.9% from last year. Processing potato and seed inventories are up 16.5% and 2.8%, respectively. Canada's March potato disappearance totaled a record 25.6% more than year prior. This year's March disappearance topped the five-year average movement by 22.1%. Usage increased in all categories. Fresh potato movement increased by 37.8%. Processing potato disappearance was the strongest on record for the month. At 24.4%, it exceeded year-earlier movement. March seed potato movement rose 15.1%. Geographically, March disappearance was strongest in the Maritime and Prairie Provinces. National intended use data continue to point to challenges for all industry sectors during the remainder of the storage season. Processing and table potato supplies are imbalanced, with excess supplies in the Maritime Provinces and shortages in the Prairie Provinces. Chip potato supplies appear to be plentiful. The current usage pace may not be enough to use all of the remaining supplies before the new crop comes online. Seed supply conditions vary geographically, and by variety. **Prince Edward Island**: Island growers held 41.9% more potatoes in storage on April 1. This year's stocks are PEI's largest since 2007. Intended use data show that this year's stocks increase is split between processing and table potato supplies. March disappearance exceeded the 2021 pace by 14.3%. Table potato usage was double from 2021 movement. That still left double the amount of table potatoes in storage on April 1. At the March usage rate, those potatoes would not be cleaned up until mid-December. The US market for PEI table potatoes has reopened. Growers and shippers are eager to move table potato supplies before they begin to break down in storage. Transportation availability and packing capacity could limit shipments. Table potato supplies in the US are limited and prices have been strong. PEI has been shipping table potatoes to other provinces, even as far as British Columbia, since the government implemented the export restrictions. The Island had 41.4% more than prior year, a record amount of processing potatoes were left in storage on April 1. Processors have been running at capacity to utilize the remaining potatoes. In addition, processing potatoes have been shipped to the Prairie provinces to fill their raw product supply gap. March processing disappearance was a record compared to March 2021 usage. If the strong March usage rate continues, the remaining processing inventory would last until September 6. The Island also has considerable fewer seed potatoes in storage on April 1 compared to year prior. It is PEI's smallest April 1 seed potato inventory on record. Part of PEI's seed was diverted to processing shortly after the government banned shipments to the US and other Canadian provinces. Those restrictions are still in place. **USA**: The potato market continues to be relatively stable on all sizes now. While size profiles had been mixed throughout Idaho, we are seeing count cartons continuing to tighten up all over. The tightest range of size appears to be on 60/70/80 count potatoes. We are beginning to see the market begin to move up again because of this. Pricing had been relatively flat for the last several weeks, but this is beginning to change relatively quickly. Historically, the market pricing is typically heavier to a specific profile, and we see pricing reflective of this. This season, we are generally not seeing pricing reduced on any specific size count cartons. This is a testament to just how short the crop is, and how spread-out demand is across the spectrum of grades and sizes in Idaho. Growers are beginning to get into their last remaining Norkotah storages and should finish them up over the course of the next month or two. Growers do see a decrease in production when switching from Norkotahs to Burbanks, as the Burbanks do not pack out with the same level of production than Norkotahs do. The concern this year is that the drop off will be significant as the Burbanks were believed to have taken the brunt of the heat wave this past summer. If that does take place, we will see a fast upturn in market pricing across all sizes and grades of potatoes. Processor demand remains heightened and continues to put pressure on the fresh crop as they are offering record prices for bulk product. Growers in all regions are preparing for a very strong May, where product is expected to significantly tighten up and remain snug until new crop in August.

KALE- Steady supplies continue to keep this market steady on green, red and black kale. Look for this market to be slightly higher due to increased freight rates. Product is still available from multiple shipping points; California, Texas and Georgia. We expect New Jersey to also be an option on the East Coast late-May.

TABLE POTATOES– Canada's April 1 table potato stocks are up 47.9%. That is by far the largest inventory for this time of year on record. March disappearance jumped much higher than the 2021 pace. At this rate, the remaining potatoes would last until the end of July. However, the inventories are dispersed unevenly. PEI still has a surplus of table potatoes. Shippers will be challenged to move the remaining inventories during the next three months. US imports of Canadian table potatoes will likely ramp up during the remainder of the storage season. Most of the other provinces appear to be metering their supplies to clean up on schedule. **Ontario**: Growers had 28.5% more potatoes left in storage on April 1 than they held a year earlier. March disappearance exceeded the 2021 pace by 2.1%. Most of the increase came in the table potato category. March table potato disappearance increased and was the strongest March usage, for the province, since 2018. At the March usage rate, Ontario's table potatoes would be cleaned up by the end of June. The province also had a record volume of chip potatoes left in storage on April 1. Chip potato disappearance fell short of the 2021 pace. At the March usage rate, the province's chip potato stocks would last until mid-August. The intended use data indicate that Ontario growers had more seed potatoes in storage on April 1 than year-earlier holdings. **Alberta**: March potato disappearance was 23.1% more than year prior. That reduced Alberta's April 1 potato stocks to less than the province had in storage on April 1, 2021. Alberta's March processing potato disappearance exceeded the year-earlier movement. Intended use data show that the processing sector had fewer potatoes left in storage on April 1 than the year-earlier inventory. At the March usage rate, Alberta's remaining processing potatoes would be cleaned up by the end of June. The province had more table potatoes left in storge on April 1 than the year-earlier inventory. March table potato disappearance exceeded last year's pace. At the March shipping pace, the remaining table potato stocks would be cleaned up by the end of April. Commercial growers in the US have been taking seed earlier than usual, to guarantee their seed supply leaving fewer seed potatoes in storage on April 1 than the 2021 inventory. **Manitoba**: April 1 potato stocks fell short of the year-earlier inventory by 10.8% decline. Manitoba's March processing potato disappearance was ahead of the 2021 pace. If the March usage pace were to continue through the remainder of the season, those stocks would be depleted by the end of June. The province's March table potato disappearance fell short of year-earlier movement. At the March usage pace, the table potatoes remaining in storage would last until July 12. The province also held fewer seed potatoes on April 1 than the year-earlier seed supply. **Quebec**: March disappearance was 3.0% ahead of 2021 usage. That left Quebec with 36.1% more potatoes in storage on April 1 than it held a year earlier. Intended use data show that the extra potatoes are divided between table potatoes, processing use, and seed. The province's April 1 table potato stocks exceeded the year-earlier inventory. At the March usage rate, Quebec's table potato stocks would be cleaned up by July 12. The province's March processing potato disappearance fell short of last year's pace. That is the slowest March processing disappearance since 2017. It left a record amount of processing potatoes in storage on April 1. As the March usage rate, the remaining processing inventory would last until October 24. We do not have the necessary data yet to make the split between french fry and chip potato inventories. Quebec also had a record amount of seed potatoes left in storage on April 1. It exceeded the province's year-earlier seed stocks by 27.5%. **British Columbia**: The province had 45.6% fewer potatoes left in storage on April 1 compared to year-earlier supplies. It is the smallest April inventory since 2011. The stocks include fewer table potatoes than the year-earlier inventory. At the March usage rate, the province's remaining table potato stocks would be cleaned up by May 5. The province also had its smallest seed April 1. Strong seed movement during February left British Columbia with its smallest seed inventory on record for this time of year.

GREEN ONIONS– Moderate supplies with a steady market is expected over the coming week as supplies are good and meeting demand. Quality and condition of the onions is very nice. Look for this market to remain steady.

ONIONS- Product has loosened up in Texas as they have dried out from their recent rain last week. It seems like they have approximately 1-2 weeks remaining for their season. Size and quality remain strong on all colors and sizes out of this region. We are not seeing an overabundance of any one particular size/color. It appears to be mostly mixed across the board. The Northwest is essentially finished up outside of maybe one or two growers in Washington primarily covering contracts. This is likely going to be the scenario for another 2-3 weeks out of this region. Any open market product still being shipped in this region is being kept close and mostly staying on the West Coast. Production has ramped up in the Imperial Valley, California **despite heavy labor challenges**. We do anticipate there is another 'gear' to hit here in terms of production volume. We will likely see that many more onions shipping out of California in the coming weeks. Originally, the industry was expecting further downward pressure on pricing out of California than we have seen thus far. This still may take place, but until production can reach its peak, pricing will likely stay relatively flat. Their size profile has been heavier to large onions. They are peaking on jumbo size and beyond, with mediums becoming much tighter than we have seen in quite some time. While growers still feel there is a higher percentage of seeders in this crop than normal, we have not been seeing these upon arrival, which is positive. The next major shipping region to come online will be New Mexico in about 3-4 weeks' time. Hopefully Southern California can get production ramped up in time to help alleviate overlapping supplies as much as possible.
ZUCCHINI- Georgia is open for business on green and yellow zucchini. Florida and Mexico also have availability, but there are some Mexican growers calling it quits due to the depressed markets. Santa Maria is expected to begin mid-May. Expect good volume for the next two weeks.
CUCUMBERS– **Field**: There is good availability in Florida and Nogales. Georgia is slowly getting into the game but still no major volume. Weather permitting, we expect decent volume from Georgia around mid-May. **English Cucumber**: We are still seeing some Mexican production. Canadian production remains very strong with good availability and excellent quality. Into June, demand levels are expected to remain high, while Mexico will wind down. Expect excellent quality to continue as Canadian crops will be in full swing. As we approach July, the Canadian crop is expected to be good quality with a lot of extra availability. **Mini Cucumbers**: Canadian production is starting to increase, and quality is excellent overall. Expect the market to be at its peak, with excellent quality. The cucumber market is healthy overall. Into June and July, we expect the Canadian mini cucumber market to come down a bit as we see extra availability. Quality expected to be excellent.

FRUIT

BANANAS- Banana availability continues to be steady with pricing getting firmer, due to higher fuel prices. Weather in the growing region remains good. Trade sanctions against Russia have increased the overall available supplies.
SEEDLESS WATERMELON- Supplies of seedless watermelons are starting to pick up. Minis are still a little tight. Supplies will continue to pick up and there will be good volume mid-May into June. Florida is going with good supplies from Southern Florida. Northern Florida is 2 to 3 weeks away. In the West, Northern Mexico is picking up in volume. Our quality has been very good. May will be a good month to promote seedless watermelons.
MANGO- Growers in the Oaxaca region continue to pack but have been met with several challenges as we get closer to the end of the season. This region has been receiving rain in the last week. Current harvest has been yielding larger sizing such as 7/8s, with very few 9/10s. Transportation in Oaxaca have decreased significantly in the last week and rates are climbing. This will continue to be an issue until we have finished packing in this region of Mexico. We are expecting to see an overall decrease in volume in the next two weeks. Michoacan is fully transitioned over to Tommy's and sizing has shifted in the last week closer to 9/10s, followed by 8s and few 12s. With the understanding that Oaxaca's volume is declining, Michoacan has been holding field prices firm and trying to increase from last week. Supply is available in this region, but it is costing more to secure. Many are speculating that the prices might drop next week after Cinco de Mayo pulls.
PAPAYA- The growing region of Colima continues to experience warmer mornings with temperatures in the mid-60s and warm days in the mid-80s with no rain. The warmer weather that we will see this week will help the crop to have better volume and harvesting will increase at the growing region. That means that there will be a little bit more volume available for the month of May. Though, last week, there were a couple cold days during the week that delayed harvesting which lowered volumes for the beginning of this week; however, supplies will remain consistent later this week and next. We are now expecting warmer weather with no rains at the growing region for the weeks to come. This will help on getting more volume into May. Please note that there will be plenty of papaya volume during the summer months from May-July.
BLUEBERRIES– Florida blueberries continue to produce good availability and volume. Mexico is increasing production and California will start picking (Coastal area) within the next week or two with the Central Valley of California (larger growing area) starting within two weeks. Southern Georgia is increasing in production, while Northern Georgia was more heavily affected by the freeze in March. Expectations through May are that there will be plenty of blueberries at reasonable prices.
STRAWBERRIES- Supplies out of California are readily available after the Mother's Day pull. Santa Maria is producing good numbers and Salinas/Watsonville will continue to increase in volume. Oxnard will continue to wind down their season by the end of May and the Baja region may finish its season in the next week or two due to quality concerns. California fruit is generally good quality and size and may be subject to occasional bruising, misshapen, green tips and shoulders, wind damage and bronzing, and discolored calyx. **Ontario**: Hothouse supplies are tight with added demand due to the overall light volume of field grown California strawberries. Quality is very good. Full color and decent sizing. Pricing is elevated. Supplies are expected to improve into May.
RASPBERRIES / BLACKBERRIES– **Raspberries**: Central Mexico will be entering its peak production starting this week and will wind down rapidly, losing half of its volume by the beginning of June. Baja will continue to uptrend until the end of May and decline quickly after the peak. Oxnard and Watsonville will continue to uptrend and keep volume afloat as Mexico volume declines. Watsonville kicked off the season with light numbers, and Santa Maria will start harvest in the second week of May. Oxnard will continue to uptrend and harvest heavy volume at peak production in the second week of June. **Blackberries**: Good supplies are still coming in from Central Mexico and Baja California as growers enter their post-peak production. The California region has been experiencing a delay from the cold weather and rain for the previous two weeks. We expect production to begin to ramp up over the next few weeks as we see warmer weather in the forecast.
GOLD PINEAPPLES– **Costa Rica**: Costa Rica is still in transition toward the rainy season with afternoon rainfall forecast for the growing regions. Cloudy skies are expected in the mornings, with precipitation in the afternoon. Quality is reported as good with normal brix levels and clean internal condition. Some Naturally Differentiated Flowering fruit within actual harvests has been seen, meaning there is mixed fruit with different ages which makes sorting complicated. The USDA pineapple crossing report for last week shows a significant drop at just above 1,000 loads crossing. The USDA is reporting demand as good and market as steady. Large grower-shippers are offering limited surplus volume at this time due to continued concerns over vessel delays. **Mexico**: Weather in Veracruz, Mexico is reported as mainly sunny with a low chance of rain. Highs are forecast near 80 degrees Fahrenheit and lows of 72 degrees Fahrenheit with winds NE at 10 to 15 miles per hour. Mexico's inbound volume for last week was reported at 60 containers crossing from Mexico into the U.S. Quality is reported as good with good internal condition and normal brix, yields still lower on small count fruit with the curve leaning more toward 6s and 7s.

GRAPES- Typically, at this time of year, we see a decline in South American imports and an increase in supplies from Mexico. With significant delays and port congestion still impacting the flow of fruit from Chile, we can expect to see volumes last well into the third week of the month. Mexico has projected a record crop, so look for aggressive pricing on all table grape varieties for June and July. Growers in the Central San Joaquin Valley are more optimistic now that the California table grape commission has come out with its estimate for the season. The 95-million box crop could very easily drop below 90 million, which could finally help growers see profits that have been so elusive over the past few years. In the short term, we should take advantage of the significant volumes expected from Mexico and look to promote table grapes all summer long.
GRAPEFRUIT- Grapefruit will be shipping out of the district 1 region (Bakersfield/Exeter, California). Grapefruit is expected to be tight all season (April through June) in California in the district 1 region with demand exceeding supplies. This is attributed to the Texas freeze we saw in February 2021, which greatly shortened the Texas grapefruit season. This shortage created more pressure on Florida to support a greater market share of the east and central parts of North America. The weather impact shortened the Florida and Texas crops, which officially brought both regions to an end at the beginning of April leaving California as the sole supplier. Quality on district 1 fruit is excellent with 90% fancy and 10% choice. The brix range is 12 to 14. Interior is seeing a vibrant bright pink/red with the exterior seeing that touch of blush that consumers love. Despite the tight market on bigger sizes of 27 to 48 counts, there is opportunity to promote the smaller sizes of 56 and 64 counts.
Offshore: There continues to be some grapefruit from Israel and Spain, however, port delays continue to cause sporadic availability.
ORANGES- **California Navel**: Navel oranges are primarily shipping from the district 1 region (Fresno/Delano/Terra Bella/Bakersfield) California. Imports from South Africa and South America are scheduled to arrive to the U.S. early July. There are limited supplies on navels as they are expected to wrap up middle/end of May, with larger growers hopeful of extending into the second week of June. The varieties currently are Washington which are ending the end of this week for shipping. At that point, most growers will transition into late Lanes/Barnfield/Powell varieties. These will carry us through the end of the navel season. Quality is excellent with brix in the 12-14 range. We will see a slight green tinge on the ends of the oranges as late varieties are just getting underway; this will clean up in the coming weeks. Peak sizing will be 72/56/88s, in that order, with minimal 113/138s around. There will not be any opportunity to promote for the remainder of the California season on navels as the demand far exceeds the supply, coupled with the navel season ending roughly 3 to 4 weeks earlier for all growers (crop is down roughly 14% year over year). **California Valencia**: Valencia (seeded) oranges are also primarily shipping from the district 1 region (Fresno/Delano/Terra Bella/Bakersfield). Valencias started last week with a few growers with most scheduled to begin harvest the middle of May. Valencia oranges will go from May through end of September. Typically, the Valencia season carries until new crop navels begin, but this will be a challenge this year as shipping will start early to counteract the early end of the navel season. Quality is excellent with brix at an average of 12. The outer appearance is good and clean, but we will see a rougher, more pebbled skin on a Valencia compared to the smooth skin on a navel. Peak sizing is 88/72/113, in that order. One callout is that the crop is down slightly from last year from early crop estimates. Quality is good: sugar levels range from 10.5 to 11 Brix. **Offshore**: Navels are now arriving from South Africa and will run through October. Delays on arrival and finding shipping containers continue to pose supply issues. Overall quality is very good and priced much lower than California fruit.
LEMONS– **California**: Lemons are in the middle of transition from the district 1 region (Fresno to Bakersfield) into the district 2 region (Filmore/Oxnard/Santa Paula). District 1 is expected to finish harvest at the end of April with supplies lasting until the middle/end of May; this will be dependent on the quality of the fruit. Peak sizing in district 1 will be 95/115/75 counts, in that order, with 80% fancy and a 20% choice. District 2 fruit began harvest last week which will go through July. Peak sizing will be 140/115/165 counts, in that order, with 60% fancy and 20% choice. District 1 fruit tends to be a lot cleaner in outer appearance compared to district 2 fruit. The reason for this is that the district 2 fruit is grown in the coastal region which can be impacted by winds. These winds ultimately scar the fruit, which will end up yielding more choice fruit. Volume is abundant with supplies far exceeding demand, allowing for aggressive promotions on certain sizes. With district 1 being at the tail end of the deal, the sizing on lemons is large. Deals will be in the 75 and 95 count sizing, with 140 count and smaller being tighter on supplies.
Offshore: South Africa lemons have started and will continue through the summer. Larger sizes will dominate the crop to start the season. Delays on arrival and finding shipping containers at source continue to pose supply issues. Overall quality is very good and priced much lower than California fruit.
LIMES- Volume is improving on smaller sizes and we are seeing downward pressure due to the increased volume. New crop limes are simply not sizing up and growers continue to cut ahead into the smaller fruit to keep the supply chain full. Sizing profile is peaking on sizes 200/230/250. We hope to see this trend continue as newer groves are being harvested and overall volume improves. **Unfortunately, we are expecting larger sizes will continue to be short until Mid-June.** Expect to see the market heavy on 200/230/250s for the next 4-6 weeks. At this time, the quality of fruit is good; however, due to climatic conditions, it is likely that quality issues such as ripening earlier than normal and sizing profile are still expected to be in mid to small sizes until late-May. Volume is expected to increase through May. However, quality concerns as mentioned above may affect utilization.
CANTALOUPE- Increased Mexican crossings combined with higher freight rates, especially from Florida due to Mother's Day flower pulls, have started to pressure the cantaloupe markets from their highs. Cantaloupe supplies from Honduras and Guatemala are extremely light at all ports. Sizing on cantaloupe is moving away from mainly jumbo fruit and providing a nice mix of 9, 12, and 15 counts. The current quality is the best growers have seen all season, with excellent shell color and solid internal brix. It is expected to remain tight all the way to the start of the Arizona / California season toward the end of May, with a gap for a couple of weeks.
HONEYDEW- Increased Mexican crossings combined with higher freight rates, especially from Florida due to Mother's Day flower pulls, have started to pressure the honeydew markets from their highs. Honeydew sizing continues to run heavier to the larger fruit 5 counts and larger leaving smaller sizes light supply. Sugar and quality have been good on both offshore and Mexican honeydew. Arizona / California honeydew are expected in a few weeks.
CLEMENTINES- The California clementine/mandarin crop will be wrapped up by middle of May, due to the crop being down roughly 25% year over year. The same goes for Moroccan fruit, which will see last arrivals into the Northeastern ports April 29th, with shipping ending middle of May. Both growing regions are in the W. Murcott variety which is the cleanest and most flavorful variety. **At the end of this variety is when we will see the market and the clementine/mandarin deal get short and a little crazy**. In the middle of May we will transition into a Peruvian Primasole variety, which is very undesirable by retailers and consumers. The Primasole variety has a more yellow tint to the fruit and overall poor flavor and eating quality. Although the fruit is not the best, it will serve its purpose this year which is to bridge the gap between the W. Murcott and the Clemenule varieties out of Northern Chile. We expect a small sizing crop this year out of Northern Chile due to the drought conditions they are currently facing, with peaks being in the 32 to 40 sizes.
PEARS- We have green D'Anjou shipping out of Washington State and Oregon currently. D'Anjou pricing is very reasonable right now with deals on all sizes. Imported Bartlett pears are arriving, and we are now starting to see imported Bosc arrive in small quantities. The ocean container freight costs are much higher this year, so we are expecting higher prices on this imported fruit. With that said, availability and pricing are showing signs of coming down this week as more vessels arrive into East Coast ports. There are also asian, forelle and cactus pears available currently as well.

STONE FRUIT- The California stone fruit season continues to get going. Volume will ramp up quickly through the month. **Apricots**: Supplies are limited, but increasing daily. Size is dominated by small fruit (volume-filled 12- and 14-count packs); larger sizes will be available by the end of next week. Quality is good: sugar levels range between 12 and 16 Brix (sweetness/flavor will peak in mid-May). **Peaches/Nectarines**: Supplies are limited, but increasing daily. Size is dominated by small fruit (60-count); larger sizes will be available by the end of next week (54- and 56-count). The season will run from June through mid-September. Good quality is forecast: sugar levels typically range from 10 to 12 brix. The Georgia peach season will begin in mid-May and continue through August. **Plums**: The California season will run from mid-June to mid-October. Fruit will begin shipping in early June. Expect good quality: sugar levels typically range from 12 to 14 brix. Plums will be sourced from Chile until June. **Cherries**: There are limited supplies of cherries are available out of California's Central Valley. It has been reported that the crop is about half the volume of last years' crop and prices will be high. The shippers are expecting it to be a short season with limited opportunity to promote. The California season is expected to run through early July. Washington cherries will be available in June and ship through August. The Pacific Northwest will have cherries available in July through September.

HOTHOUSE TOMATO- **Red Tomato On-The-Vine**: There are very good supplies of red TOV's. Quality remains to be good. Canadian harvest is strong. Volume is expected to continue increasing. Mexico picks are expected to start winding down until the end of the month. Into June, full production continues in Canada and the USA with good quality expected. The Canadian TOV crop will continue have steady production. We continue to expect higher markets and strong demand overall in the tomato market, as growers continue to face pressure with the Rugose Virus. **Beefsteak**: We continue to be in good supply with both Canadian and USA crops. Mexican supply is starting to slow. Canadian volume will start to slowly increase. Overall quality is outstanding. **Bite Size (Cherry, Grape, Cocktail, Medley)**: Flavor and quality continues to be strong from Canada and Mexico. Supply from Canadian crops is expected to be good, with consistent availability throughout the summer. There is also good supply of grape and medley tomatoes.

AVOCADO- With the Cinco de Mayo pull now behind us, demand has eased off and pricing will return to a more competitive level this week. Shippers are working to stay fresh on inventory aging and being careful not to get caught with high-cost fruit as market pricing decreases. While growers continue to ask for higher prices, shippers are slowing down inbounds to not extend past their customer volume commitments. This tone is expected to continue until demand increases again in a couple of weeks in preparation for Memorial and Victoria Day weekend sales. Industry arrival totals for last week were around 58 million pounds. Mexico shipped 42.1 million pounds, California harvested 15.7 million pounds, Colombia shipped 470,000 pounds, and Peru delivered 240,000 pounds. Current inventories at the border are in the low 50-million-pounds range and are expected to decline through the end of the week. Mexico leads the industry with 69% of total inventory. Weekly averages for the next four weeks are expected to adjust down to the 47-53 million-pounds range. Arrivals are expected to combine product from Colombia, Mexico, California, and Peru. **Mexico**- Michoacán reported a 46.5-million-pound harvest for last week, with 42.1 million pounds shipped to the U.S. As demand lowers following Cinco de Mayo, this week is expected to have a reduced harvest. The industry has about 2-3 months left of the Negra crop, and supply conditions are expected to remain tight through the rest of the season. As the season approaches the final weeks of the crop, the size curve is slightly shifting toward more medium-sized fruit. Field prices remain high due to the limited supply remaining for the season. **California**- Last week, 15.1 million pounds were harvested, and a gradual decline is expected in the coming weeks as the industry approaches the end of the California harvest. The estimated harvest is 15.5 million pounds for week 18 and 14.7 million pounds for week 19. The preliminary forecast for the entire season is listed at 290+ million pounds. **Chile**- Chile delivered nothing last week. Expected arrivals are around 120,000+ for each of the next two weeks. Estimated arrivals from Chile for the first half of 2022 are listed to be between 9-12 million pounds. **Colombia**- Colombia delivered 470,000 pounds last week. Expected Colombian arrivals are around 300,000+ pounds for each of the next two weeks. Estimated arrivals from Colombia for the 2022 calendar year are expected to be around 9-11 million pounds. **Peru**- Peruvian volumes last week totaled 240,000 pounds. Estimated arrivals are around 500,000+ for the current week and 600,000+ pounds for the next. Estimated arrivals from Peru for the 2022 calendar year are expected to be around 220+ million pounds. **Market Outlook-** The industry's inventories have stabilized with the harvests from California and Mexico. The industry has started to see a standard size curve on fruit in Mexico, while California's size curve is peaking on 60s/20s and smaller.

MATURE GREEN TOMATOES– Tomato volume continues to shift from Mexico to Florida. More robust spring crops are expected as the Ruskin/Palmetto production area of Florida continues to ramp up. **East Coast**: Markets remain fairly steady. The Ruskin/Palmetto area is up and running and we expect increased production over the next two weeks. Roma, round, cherry, and grape tomato quality is good. Pricing remains fairly steady with steady demand. Large sizes (5X6) dominate the market as crown pick continues in new the new fields. Romas out of Florida are a bit more behind and we should see that volume start to increase in about 2 weeks. The Quincy, Florida region is scheduled to start the first week of June. **West Coast**: Volume continues to decline as we approach the tail end of the season out of Nogales. We expect to see a limited amount of rounds starting out of the California Desert next week. Baja, Sonora, and Jalisco continue to build volume and won't get into significant volume till the first week of June. We should see volume gradually improve this week. Grape tomato production will transition as well to Baja through May. Expect markets to increase slightly this week.

APPLES- **Washington**: The apple market has leveled out this week and the prices are fairly stable on most items. We expect prices to remain steady to start May, then possibly start to push upward again around the middle of May as inventory levels drop. The overall crop is down this year with the total crop estimated to be around 118 million cases. This will make the second crop in a row that is smaller than normal and looks to be at least 3 million cases shorter than the crop last season. Most growers feel that the crop was hurt by the extreme heat and weather conditions that we experienced during the summer months. The tightest items continue to be Honeycrisp and Royal Gala apples. The quality of the fruit has been good so far, but we will need to see how the fruit holds up in storage. Pricing overall is running higher due to the shorter crop and overall inflation in the growing chain including labor, picking, packing, and transporting of apples. This is shaping up to be a challenging year. **Ontario/Quebec/Michigan/New York**: Grower/packers are packing out of controlled atmosphere storage rooms. MacIntosh, Empires, Cortland, Red Delicious and others continue. Royal Gala's and Golden Delicious are finished for the season. Quality is outstanding with steady pricing.

WILD FORAGED PRODUCTS:

**** NEW ** Mousseron (Fairy Ring) Mushroom**: From Bulgaria. First of the season.
**** NEW ** Fresh Porcini**: From Oregon. Just starting.
St. George's Mushrooms: From France. Light supplies. 1kg baskets.
Bluefoot Mushroom: From France 2kg. basket.
Wildfire Morel Mushroom: From British Columbia. Price lower. Big volume coming. 5lb case.

**** NEW ** Wild Asparagus**: From France. First harvest of the season. 200g bunches.
Ramps: From Appalachian Mountains. 1lb bags.
Spruce Tips: From Oregon. 1lb bags.
Fiddleheads: From British Columbia. Prices easing. 5lb bags.
Wild Bear Garlic: From France. 1kg crate.
Stinging Nettles: From Oregon. 1lb bags.

Summer Truffles: From Italy. Just starting. Early Season.

Upcoming products and estimated start times:

- Chanterelle: Imports usually begin late-May

ITEMS NOW IN SEASON:

OFFSHORE POMEGRANATE / CLEMENTINES / BLACK GRAPES / ONTARIO HOTHOUSE STRAWBERRIES / HOTHOUSE RHUBARB / ENGLISH PEA / APRICOT / CHERRY / FIDDLEHEADS / RAMPS (WILD LEEKS) / FAVA BEANS

ITEMS VERY SHORT: DRAGON FRUIT / STARFRUIT / FINGERLIMES / PEACH / NECTARINE / PLUM / BLOOD ORANGES / FLORIDA JUICE ORANGE

ITEMS NO LONGER AVALIABLE: PUNTARELLE / GARLIC SCAPE / PICKLING DILL / PRUNE PLUMS / FUYU and HACHIYA PERSIMMONS / TANGERINE / CARA CARA ORANGES / FLAT(POLE) BEANS