



OVERVIEW:

Tight market conditions persist across the vegetable category as freezing temperatures in Florida and Mexico disrupt production for tomatoes, peppers, squash, and corn. Buyers should anticipate "Act of God" declarations from Florida growers, while mildew issues in Yuma are shortening shelf life for lettuce and tender leaf items. Significant prorates of up to 50% are expected for broccoli and cauliflower, and recovery for carrots and celery is not projected until March. Meanwhile, asparagus remains scarce as the Peruvian season concludes and Mexican harvests struggle with ongoing cold.

In the fruit sector, California citrus shows strong volume in large sizes, but a critical shortage of small-sized navels necessitates size substitutions. While Mexican avocado harvests remain robust with a surplus of jumbo fruit, small sizes remain tight. Tropical supplies are mixed: lime and pineapple availability is improving, but banana stocks are tightening due to global demand and viral pressure. Although strawberry volumes are rising slightly, blueberries remain constrained by seasonal transitions and weather disruptions.

Widespread logistical hurdles continue to aggravate these supply gaps. A 10% nationwide shortage persists due to safety regulations, while high freight rates and driver delays create ongoing instability. Carriers frequently pivot to other industries unless produce rates are highly competitive, further straining availability. Stakeholders should maintain close contact with suppliers and remain flexible with size specifications as volatility is expected to continue through the end of the month.

ALERT LIST:

ESCALATED

Bok Choy, Broccolini, Cilantro, Fennel, Anise, Green Leaf/Red Leaf, Hot Pepper: Red Fresno, Caribe and Shishito, Leeks, Limes, Napa, Parsley Italian, Romaine, Snow Peas & Sugar Snap Peas, Strawberries, Sweet Corn, Tomatillos, Tomatoes (Rounds, Romas and Snacking Tomatoes - Mexico), White Asparagus

EXTREME

Asparagus, Blueberries, Broccoli/Florets/Crowns, Cauliflower, Celery/Celery Sleeved, Green Beans, Green Onions, Lettuce, Lettuce Cello/Wrapped, Romaine Hearts, Spinach, Tomatoes (Rounds, Romas and Snacking Tomatoes - Florida), Warm Veg Category (Florida: Corn, Beans, Cucumber, Soft Squash, Bell Pepper, Eggplant)

WATCH LIST:

Bananas, Red & Green Cabbage, French Beans, Red Leaf Lettuce, Herbs, Small Lemons, Pineapple, Ginger, Cantaloupe, Honeydew, Raspberries, Small Citrus

BERRIES



Strawberries

Volumes rose slightly as post-holiday demand softened. However, persistent rain in Oxnard, Santa Maria, and Baja continues to delay harvests and lower volume forecasts, requiring crews to strip damaged fruit when weather permits. Central Mexico is entering its late-season decline, showing some bruising despite generally good quality. In Florida, multiple freezes have caused water damage, uneven ripening, and internal discoloration. While Florida saw a brief volume spike this week, the improvement is expected to be temporary.



Blackberries

Central Mexico and Baja maintain steady production and good availability. While overall quality is high, recent heat and humidity have led to occasional softness and color reversion.



Raspberries

Supplies are tightening as the Central Mexico and Baja crops move past their seasonal peaks. Quality is largely stable, though heat and rain in the growing regions have caused some reports of overripe or soft fruit.



Blueberries

Demand is outpacing supply as Mexican production moves past peak volume. While Mexican fruit shows strong size and quality, overall availability will remain limited for several weeks. South American imports are declining, and recent freeze-related crop losses in Florida may significantly delay the early spring harvest.

CITRUS



Limes

Cooler weather has reduced yields from Mexico, Colombia, and Peru. Inventory currently skews small, though rain in Southern Mexico is beginning to bring on larger fruit. Quality is fair, with some disease impacting shelf life. Expect volatility through March.



CA & TX Citrus

California is peaking on large-size Lemons, Navels, Cara-Caras, and Mandarins. A critical shortage of small fruit (113s/138s) makes substitutions for 72s necessary. Texas Valencias and Rio Red Grapefruit are available through April to supplement supply. Across all varieties, including specialty items like Minneolas and Blood oranges, large fruit is plentiful while small sizes remain tight.

WEST COAST LETTUCE



Iceberg & VA

Supply and quality are marginal with light weights. Adverse weather and low yields caused by mildew and cap leaf damage are driving prices up. Expect inconsistent quality and reduced shelf life. VA: Inventory and quality are fair. Recent reports indicate mildew in bags and shortened shelf life.



**Romaine,
Hearts & VA**

Romaine shows bruising, fringe burn, and mildew on outer leaves. While quality is fair, growers are strictly enforcing averages. Romaine Hearts have reached extreme trigger levels. Markets are trending up with supplies expected to tighten further through March. VA: Quality is fair, though processed bags are showing increased core material and instances of mildew.



**Better Burger,
Green & Red Leaf**

While currently available, weights remain light. Mildew and fringe burn persist across these varieties as the market trends upward.

MELONS



Cantaloupe

Inventory shows a healthy mix of 9s and 12s, with 15s becoming more available. Quality remains consistent with sugar levels averaging between 12-14%.



Honeydew

Production is currently dominated by 5s and 6s, with 8-counts extremely limited. Arrivals will dip over the next two weeks due to regional shifts; size flexibility is required during this transition. Quality is improving with sugar levels between 11-13%.



Watermelon

Seedless markets are rising as Mexican volume declines. Significant production drops in Guatemala due to cold weather have shifted sizing from 45s to 36s. Impending harvests in Florida may be impacted by recent freezing temperatures.



TOMATOES - USA



Round & Roma

Round and Roma markets will remain volatile through early May following unprecedented freeze damage in Florida. Expect "Act of God" declarations and inconsistent supply as growers salvage remaining crops. Subbing sizes and varieties will be necessary.

**Snacking (Cherry,
Grape, Medley)**

Snacking varieties, including Grape, Medley, and Cherry, are very short. While Grape volume showed a slight uptick this week, pricing remains high and overall availability is critical.



TOMATOES – MX



Round

Round tomato volume is slowly increasing, but high demand from the East Coast is offsetting gains and driving FOB prices higher. Quality through McAllen and Nogales remains very good.

Roma

Roma volume is light due to virus pressure and reduced acreage—a result of duty volatility and the suspension agreement dismissal. Quality is fair, with prices trending up as demand shifts west.

Grape

Supplies are lighter while demand from the East Coast remains high. Pricing is trending upward due to the weather-driven shortages in Florida, though quality remains outstanding.

Cherry

Availability is limited and the market is strengthening. High demand and cold weather in competing regions are keeping prices firm despite the strong quality of Mexican crossings.

Mixed Medley

Inventory is tightening as buyers shift volume away from Florida. Expect continued price pressure throughout the week, even as quality levels stay excellent.

FRUITS & VEGETABLES



Avocados

Mexico harvested 73.5 million pounds last week, exporting 61.5 million pounds to the U.S. Supply is currently peaking on 48s and 60s with dry matter at 32%. Volume is abundant, though seasonal rain may cause occasional lenticel spotting.



Bananas

Supplies are tightening as tropical production dips and global demand rises. Yields are pressured by virus issues and higher production costs, though current quality is high. Consistent ordering is recommended to maintain program stability.



Pineapple

The market is beginning to level out but remains tight due to strong demand and steady pricing. Contracts are being fulfilled, but size flexibility is necessary to ensure uninterrupted supply. Quality and flavor remain consistent.



Table Grapes

Availability is stable across all colors with excellent quality and high sugar content. Key varieties include Sweet Globes for greens, and Red Globes or Sweet Flavors for reds, with generic options also available to round out supply.



Green Bell Pepper

Supply is very light from Mexico due to weather and insect pressure, while Florida is extremely short following freeze losses. Prices are rising sharply, and volatility is expected through mid-April.



Color Bell Pepper

Cooler weather and insects have reduced Mexican yields, while Florida remains short due to frost. The market will remain unstable through April, though potential volume in the Hot House category may offer upcoming relief.



Eggplant

Florida's domestic supply is very light due to freeze damage. Mexico continues to provide the best quality and strongest volume through Nogales.



Cucumbers

Slicer: Mexican production is improving with outstanding quality. Florida remains short, necessitating outside sourcing from Honduras and the Dominican Republic. Volatility will likely persist through April. English: Lighter supply and moderate demand have driven prices higher. Quality remains good for current arrivals.



Green Beans

Florida supply is nearly non-existent due to the freeze, with "Act of God" declarations expected. Mexican production has also slowed due to cold weather. Expect daily price increases and supply gaps through early April.

French Beans

Cold weather and frost in Guatemala have slowed production, while East Coast vessel delays are causing inconsistent arrivals. Yields in Mexico also remain impacted by cool temperatures.



**Zucchini/
Yellow Squash**

Florida supplies are very short following the freeze, while lighter crossings through Nogales and McAllen are further driving prices up. Mexico is currently providing the best quality. Expect market volatility to continue through March.



Fresh Herbs

Basil remains inconsistent due to cold weather in Mexico, heavy rain in Colombia, and frequent USDA fumigation delays; winter tip burn may occur. Chervil has improved and most other herbs are steady, Tarragon remains limited. Arugula and Cilantro are currently under extreme supply pressure, and prorates are likely.



Artichokes

Quality and supply are both stable. While large sizes remain somewhat limited, overall availability is improving.



Asparagus

Cool weather in Mexico and the seasonal conclusion in Peru have severely restricted volume. Expect active markets and tight supplies for at least two weeks, requiring size substitutions and prorates until Mexican yields rebound.



Bok Choy

Quality and supplies are currently fair.



Borccoli/Crowns

Inventory has tightened significantly as rain and heat in Yuma cause browning and pin rot. Growers are enforcing strict averages, with some prorates reaching 50%.



**Broccolini/Sweet
Baby Broccoli**

Supplies are extremely restricted due to weather-related harvest delays. Expect prorates as high as 60% from several growers as the market remains volatile.



Brussel Sprouts

Markets have stabilized and are no longer escalated. While some insect pressure and internal browning persist, overall quality and volume are improving as production shifts regions.



Carrots

Persistent rain and muddy fields have limited the harvest of Baby, Cello, and Jumbo varieties. Mexican volume is also down due to seasonality. Expect prorates and tight availability until conditions dry out. Jumbo options are currently available for loading in Georgia.



Cauliflower

The market remains at extreme levels as supplies have tightened across the board.



Celery

Harvests remain hindered by weather, resulting in limited volume and mandatory prorates on value-added items. Full relief is not anticipated until April.



Corn

Florida estimates an 80% crop loss due to cold weather, leading to record-high spot pricing and anticipated "Act of God" declarations. Higher demand is further straining lighter Mexican supplies. Volatility will persist through April.



Fennel

Low field yields have triggered a shortage. Pricing remains high, and some growers are enforcing 8-week purchase averages or prorates.

FRUITS & VEGETABLES



Kale

Supply remains light with fair quality as weather continues to disrupt harvesting schedules.



Leeks

Overall quality and inventory are currently fair.



Garlic

Quality is strong, but the current crop is snug. Steady purchasing is advised to ensure consistent coverage throughout the year.



Ginger

Market conditions and supplies remain stable.



Green Cabbage

Current quality is good, but the market is expected to tighten significantly as we move into March.



Green Onions

Industry-wide shortages persist due to previous rain in Mexico. Expect very strict averages and prorates to continue through the beginning of March.



Mushrooms

Supply and quality are both stable. No significant changes in availability are expected over the coming weeks.



Napa Cabbage

Quality remains high, but supplies are tightening as market prices rise.



Parsley

Both quality and inventory levels are currently in good standing.



Red Cabbage

Quality is holding well, though overall availability is currently light.



Spinach

Inventory is limited by weak texture, wilting, and increasing disease and mildew pressure.



**Snow Peas &
Sugar Snaps**

Guatemalan snow peas are steady, but sugar snaps are hampered by cold weather. Mexican yields remain limited during regional transitions; relief is expected in 5-10 days as the Baja season begins.



Onions

The onion market is stable, with all shipments now transitioning exclusively to Pacific Northwest storage. No significant price or supply shifts are anticipated through the end of the quarter. Plentiful availability and consistent quality continue to favor buyers.



Potatoes

Supply remains fully supported by storage shipments with strong sizing across all categories. The long-term outlook suggests a soft market similar to last season, with potential tightening and higher pricing not expected until late spring.