



## OVERVIEW:

Production remains consistent in Florida and Mexico thanks to favorable weather, though the impact of last week's cold snap in Florida is still being evaluated. While overall quality is high, heavy rainfall and fog in California and Baja have severely disrupted operations. These wet conditions are expected to hinder harvests for the next two to three weeks, necessitating adjustments to quality and shelf-life expectations. Green onions and celery are currently the most challenged items due to significant storm damage. Green onions will remain scarce through late January, while celery faces strict allocations and a 10–15% reduction in value-added packs until mid-February. Carrots are also under pressure, with rain and lack of sunlight impacting the harvest of cello and jumbo sizes. Similarly, the spinach, parsley, and cilantro markets are extremely tight due to weather and insect pressure. Broccoli prices remain high, though they are beginning to trend downward despite ongoing issues with pin rot and small sizing.

The avocado market is experiencing higher pricing and limited availability following light holiday harvests in Mexico, with supply currently favoring medium and large fruit. Table grapes are seeing relief as offshore volumes increase, though green varieties still lag behind reds. Conversely, melon yields from Guatemala have dropped due to cold nights and rain, which will limit volume for the next month. Banana supplies are expected to tighten throughout Q1 as growers face increased global demand and tropical production challenges.

In the citrus category, navel oranges are peaking on large sizes; small fruit is critically short and may require substitutions like mandarins or minneolas. Lemons are in good supply, trending toward fancy grades. The lime market remains active, but larger fruit is becoming harder to source as new regions enter their peak with smaller sizes. Pineapple availability has seen slight improvements, though size flexibility remains necessary to fulfill orders. Strawberry production in Oxnard and Baja continues to suffer from persistent rain. To maintain supply, Mexican fruit is being rerouted to the West Coast, though this product requires shorter transit times and immediate use to preserve condition. Tomatillos are still short but show signs of gradual improvement. On a positive note, Brussels sprouts are finally stabilizing as Mexican supplies increase, with full recovery expected by next week. Garlic supplies remain steady for now, though availability is projected to tighten later in the year.

## ALERT LIST:

ESCALATED	EXTREME
Artichokes, Asparagus, Bok Choy, Broccoli, Cilantro, Fennel, Anise, Hot Pepper: Red Fresno, Poblano, and Habanero, Leeks, Limes, Napa, Parsley Italian, Red Leaf, Snow Peas & Sugar Snap Peas, Spinach, Strawberries, Table Grapes, Tomatillo, White Asparagus	Boston/Butter Lettuce, Brussels Sprouts, Brussels Sprouts VA, Celery/Celery Sleeved, Green Onions

## WATCH LIST:

Bananas, Blueberries, Broccolini, Red Cabbage, Cauliflower, French Beans, Herbs, Lettuce, Pineapple, Ginger, Cantaloupe, Honeydew, Small Oranges

## BERRIES



**Strawberries**

Western supply is constrained by persistent rain, causing the summer-planted crops in Oxnard and Santa Maria to end early. Fortunately, new fall-planted spring crops are beginning production to maintain winter continuity. Baja is in its early stages with volumes expected to rise after the first of the year, while Central Mexico and Florida are both seeing steady weekly increases in high-quality, fully colored fruit.



**Blackberries**

Harvesting remains active in Central Mexico and Baja with healthy availability. While overall quality is high, recent heat and humidity have caused minor issues with fruit softness and color reversion.



**Raspberries**

Supplies are tightening in Central Mexico and Baja as fields move past their peak. While quality is generally strong, the recent humidity and rain have led to some instances of overripe or soft berries.



**Blueberries**

Currently on a watchlist, Mexican production is tapering off after its seasonal peak. Despite the lower volume, the quality and size of Mexican fruit remain superior to current offshore options.

## CITRUS



Limes

Supply is constrained across Mexico, Colombia, and Peru due to heavy rainfall. Current harvests are peaking on 200s and smaller, with extremely limited availability on 175s and larger. Quality is currently fair, as disease pressure is impacting shelf life and appearance; expect price and size volatility through March.



Small fruit is critically tight and expected to worsen as persistent rain and fog hinder harvest efforts.

## Small Oranges

## WEST COAST LETTUCE



Iceberg & VA

Supplies and quality are stable, but weights remain light. The market is active as growers deal with low yields caused by mildew and cap leaf damage. Soilborne diseases are being closely monitored following heavy rains. VA: Quality and supplies are currently fair. Reports indicate shorter shelf life and the presence of mildew within the bags.



Romaine,  
Hearts & VA

Quality is fair, though outer leaves show signs of bruising, mildew, and mechanical damage. Actual heart material is extremely limited, with weather impacting both weight and overall harvest consistency. VA: Quality and supply remain fair. Recent weather has resulted in more core material and some mildew appearing in processed packs.



Green & Red Leaf

Availability is improving, though weights remain light. While overall quality is good, growers are still managing fringe burn and mildew pressure caused by recent storms.

## MELONS



Cantaloupe

Production is set to increase next week, primarily peaking on 9s and jumbo 9s, while small fruit remains scarce. Overall quality is good with high sugar content (12–14% brix), though some fruit may have a greener external tint.



Honeydew

Supply is extremely limited for the next two weeks due to cold, wet weather during the growing cycle. Expect improvements around January 12, but until then, flexibility on sizing is required; fruit may show scarring or dirt.



Watermelon

Florida production is ending and will not resume until April. However, steady supplies of Mexican fruit are crossing through Texas and Nogales, and offshore Guatemalan imports are providing a consistent volume of bins and cartons.



TOMATOES – USA



## Round & Roma

Round: Supply dipped this week following a cold front, though volume is expected to improve over the next fourteen days while quality remains high. Roma: Expect lighter volume and some challenges with color maturity this week; while overall quality is good, some market volatility is anticipated.

## Snacking (Cherry, Grape, Medley)

Grape Medley supply is lighter with higher pricing, though quality remains very nice. Both Grape and Cherry tomatoes show steady supply and good quality.



## TOMATOES - MX



<b>Round</b>	Volume remains consistent for fruit crossing through McAllen and Otay, with good quality reported.
<b>Roma</b>	Supply is excellent as growers begin harvesting new fields, though some volatility remains possible if the national market strengthens.
<b>Grape</b>	Grape tomatoes show excellent supply and high quality.
<b>Cherry</b>	Cherry tomatoes remain steady with good quality.
<b>Mixed Medley</b>	Grape Medley inventory has tightened, leading to significantly higher pricing

## FRUITS & VEGETABLES

	<b>Avocados</b> Mexico's initial weekly output reached 53.7 million pounds, with 46.6 million pounds arriving in the U.S. The harvest is currently 90% main crop, featuring 30% dry matter and peaking on 48 and 60-count sizes. While demand remains elevated, picking should ramp up next week to better align with industry requirements.
	<b>Bananas</b> This commodity is moving to a watchlist as tropical production declines while global demand increases. Growers are managing virus pressure and rising overhead, which will likely contract supply soon. Current quality is high and volume is sufficient, but consistent ordering is recommended to maintain stability.
	<b>Pineapple</b> The market is beginning to level out, though high demand is keeping prices firm. While contracts are being fulfilled, quality is strong, and flavor is good, shippers require flexibility on sizing to ensure steady delivery.
	<b>Table Grapes</b> The transition to new-crop South American fruit is finished, offering excellent quality. Markets remain firm but are starting to ease as more volume arrives. Green varieties, such as Sweet Globes, are currently the scarcest but should see improvement within 10 days. Red Globes and Sweet Flavor are also available alongside generic options.
	<b>Green Bell Pepper</b> Supply remains steady with high quality currently available from Nogales, McAllen, and South Florida.
	<b>Color Bell Pepper</b> Volume and quality are consistent for fruit crossing through McAllen and Nogales.
	<b>Eggplant</b> Domestic supply is stable in Florida and volume remains strong through Nogales; quality is very good in both regions.
	<b>Cucumbers</b> Slicer: Crossings through Nogales and McAllen are steady with outstanding quality. While Florida production is slowing due to cooler temperatures, Honduran imports are expected to begin within a week. English: Availability remains steady through Nogales and Canada with good quality reported.



## Green Beans

Florida volume dipped following last week's cold snap but should recover within 14 days. Mexican production is increasing, and the overall January outlook remains stable with good quality.



## French Beans

Currently on a watchlist, Guatemalan supplies are fair but hindered by container delays. Mexican yields are also being impacted by cooler weather.



## Zucchini/ Yellow Squash

Cold weather has tightened supplies in Florida and Nogales, causing a market reaction. McAllen and Nogales remain stable, and Mexican quality remains high.



## Fresh Herbs

Basil production is healthy in Colombia and Mexico, though rain has caused minor quality issues. Chives remain limited due to weather and holiday transit delays. Italian Parsley is under extreme pressure, with some growers issuing prorates.



## Artichokes

Inventory is extremely low, particularly on large sizes. Shippers are holding to strict averages and substituting with 12ct and 18ct when possible. These constraints and the resulting high prices are expected to last through January.



## Asparagus

Markets remain firm and active as Mexican output is hampered by weather and logistics. While Northern Peruvian volume is rising, the Southern region is slowing down, shifting the size profile toward smaller spears.



## Bok Choy

Both quality and supply are currently maintaining fair levels.



## Broccoli/Crowns

The market remains escalated with limited supply and reports of pin rot and browning. Yields are expected to be challenging through January, and Organic Broccoli remains at extreme price triggers. Supplies remain restricted due to weather-related harvest disruptions. Quality is fair, but consistency varies by grower.



## Broccolini/Sweet Baby Broccoli

Currently on a watchlist, quality is high but volume remains light. Growers are sticking to strict averages, and prorates are possible until weather patterns stabilize.



## Brussel Sprouts

While still in an extreme market, supplies are slowly improving. Quality is getting better despite some lingering internal browning and insect pressure; relief is anticipated in the coming weeks.



## Carrots

Rain and muddy fields have made harvesting difficult, particularly for Cello and Jumbo varieties. Expect prorates and limited availability for the next 2–3 weeks, as Mexican volume is also seasonally declining.



## Cauliflower

Supply and quality are currently good, though Organic Cauliflower remains at an extreme price level.



## Celery

Conditions are extreme with very tight supplies and storm-related quality issues. Growers are working through affected fields, and prorates are expected on value-added items.



## Corn

Lighter volume from both Florida and Mexico is maintaining upward price pressure, though quality remains high.



## Fennel

Low field yields have created a shortage, keeping prices high. Many shippers are limiting orders to 8-week averages to manage the lack of inventory.

## FRUITS & VEGETABLES

	<b>Kale</b>	Weather has disrupted both the quality and harvest of Kale, resulting in limited market availability.
	<b>Leeks</b>	Quality and supply levels are currently stable.
	<b>Garlic</b>	Supplies are snug but quality is good. It is recommended to maintain steady purchasing patterns to ensure consistent coverage as the year progresses.
	<b>Ginger</b>	The market and inventory levels remain steady.
	<b>Green Cabbage</b>	Green Cabbage shows good quality and supply.
	<b>Green Onions</b>	This category is under extreme pressure with some growers reporting zero inventory. Rain-damaged fields will keep yields low through the end of January, and strict prorates will be in effect for at least the next two weeks.
	<b>Mushrooms</b>	High holiday demand is outstripping light supply. This pattern is expected to continue through the start of the year, though quality remains high.
	<b>Napa Cabbage</b>	Napa Cabbage quality is also strong, though inventory is tightening and prices are on the rise.
	<b>Parsley</b>	Recent rain has damaged yields and hindered harvests. Italian Parsley is particularly limited, and prorates are expected to continue through January.
	<b>Red Cabbage</b>	Now on a watchlist; quality remains high, but available volume has lightened.
	<b>Spinach</b>	Supply is constrained with reports of discoloration, wilting, and weak texture. Poor weather continues to hinder both quality and harvest, with yields expected to remain low through the end of January.
	<b>Snow Peas &amp; Sugar Snaps</b>	Guatemalan output is improving, with sugar snaps showing faster recovery than snow peas. While Mexican sugar snap supply is currently plentiful, Mexican snow peas remain limited due to active field transitions.
	<b>Onions</b>	The market is stable as the industry shifts entirely to Pacific Northwest storage supplies. Pricing and quality currently favor buyers, and no significant market shifts are expected through the current quarter.
	<b>Potatoes</b>	Supplies are fully supported by storage shipments with strong availability across all sizes. Norkotahs remain the primary variety, with Burbanks available in lighter volumes. The market is expected to remain soft until late spring.