



OVERVIEW:

Mexico remains a reliable source of steady production, but looming cold fronts in Florida and recent heavy precipitation in Yuma have introduced significant instability into the supply chain. The combination of warmth and moisture in Yuma has triggered widespread mildew across all lettuce and tender leaf categories, including spinach and spring mix. Consequently, buyers should anticipate limited availability, frequent prorates, and diminished shelf life for these items through the end of January. Meanwhile, persistent rain in California and Baja continues to hamper strawberry harvests, necessitating the use of Mexican transfers to fill gaps. These substituted berries involve longer transit times, meaning quality and shelf-life expectations must be adjusted downward for West Coast loading.

The industry is currently facing critical shortages for carrots, celery, green onions, and Brussels sprouts, all of which are under strict allocations that are expected to persist for several weeks. The citrus market is also seeing a shift, as recent rains have caused Navel oranges to size up significantly. This has left small-sized fruit extremely scarce, making substitutions with Mandarins or Minneolas necessary for the remainder of the season. While lemons are currently peaking on larger fancy grades, a premium on smaller sizes is anticipated by spring as regional harvests transition.

On a more positive note, table grapes are finally seeing relief as offshore volumes increase, although green varieties continue to trail reds in total volume. Avocado production has bounced back aggressively following the holiday season, with heavy harvests moving toward the U.S. to satisfy high demand leading up to the Super Bowl. While melon and pineapple availability shows marginal improvement, Guatemalan honeydews continue to struggle with low yields caused by cold nights and rain. Overall, stakeholders should prepare for continued market volatility through the first quarter as growers navigate these complex weather patterns and economic pressures in tropical regions.

ALERT LIST:

ESCALATED	EXTREME
Artichokes, Asparagus, Bok Choy, Broccoli Crowns Asian Cut, Cilantro, Fennel (Anise), Hot Pepper (Red Fresno and Shishito), Leeks, Limes, Napa, Parsley Italian, Snow Peas & Sugar Snap Peas, Strawberries, White Asparagus	Boston/Butter Lettuce, Brussels Sprouts, Brussels Sprouts VA, Celery/Celery Sleeved, Green Onions, Spinach

WATCH LIST:

Bananas, Blueberries, Broccoli, Broccolini, Cabbage (Red), Cauliflower, Florida Veg (Beans, Corn, Cucumber, Eggplant, Bell Pepper, Soft Squash & Tomatoes), French Beans, Ginger, Herbs, Lettuce, Cantaloupe, Honeydew, Pineapple, Small Oranges
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BERRIES



California's summer-planted crops are finishing, though new fall-planted spring crops are beginning to harvest. While quality is good, Florida's volume has dropped by half due to cold weather, with frost risks likely to keep yields low for the next week. Mexico's production remains steady, and Baja is expected to ramp up as weather clears.



Supplies from Central Mexico and Baja remain stable with good overall availability. While quality is generally strong, recent heat and humidity have caused some issues with fruit softness and color reversion.



Supplies are tightening as the season moves past peak volumes in Central Mexico and Baja. While quality is holding, recent rain and humidity in these regions have resulted in some overripe or soft fruit at arrival.



Central Mexico is currently the primary source for high-quality fruit, though volumes are trending downward from their seasonal peak. Supply is tight across the industry as production from Peru and Chile has also declined.

CITRUS



Limes

Heavy rainfall across Mexico, Colombia, and Peru has severely restricted volume. The market is currently peaking on 200s and smaller, with extremely limited availability of 175s and larger. Quality is currently fair, as disease pressure is impacting appearance and shelf life; expect price volatility and size shortages to persist through March.



Small Oranges

Availability of small-sized fruit (138/113/88) is very tight and expected to decrease further. Ongoing rain and fog in the growing regions continue to hamper harvest efforts, limiting the supply of smaller fruit for the remainder of the season.

WEST COAST LETTUCE



Iceberg & VA

Supply and quality are currently stable, though weights remain light. The market is active and expected to rise as mildew damage and poor cap leaves reduce overall yields. Growers are closely monitoring for soilborne diseases following recent heavy rains. VA: Product quality and availability are marginal. Recent reports indicate presence of mildew within the packaging and shortened shelf life.



Romaine,
Hearts & VA

Availability is adequate, though quality is hampered by bruising, light weights, and mildew on outer leaves. Romaine heart material is extremely limited at this time. VA: Supplies are stable, but quality is inconsistent. Processed bags are showing an increase in core material and occasional mildew.



Better Burger,
Green & Red Leaf

Inventory has improved, and quality is generally good. While mildew and fringe burn remain present and carton weights are still light, overall field conditions are beginning to trend upward.

MELONS



Cantaloupe

Production and sizing have improved this week, offering a healthy mix of 9ct, 12ct, and jumbo fruit. Quality is strong with brix levels consistently between 12–14%.



Honeydew

Supply is extremely limited as crops struggle with recent wet, cool weather. Expect availability challenges and a need for size flexibility for the next two weeks, with gradual improvement anticipated around January 26. Mud and surface scarring are typical for current arrivals.



Watermelon

Domestic Florida production is ending and will not resume until April. However, steady supplies are available via offshore imports from Guatemala and Mexican crossings through Texas and Nogales. Quality remains good across both bins and cartons.



TOMATOES – USA



Round & Roma

Supplies are expected to lighten this week as fruit maturity and coloring slow down. Imminent cold weather in Florida is likely to cause market volatility; while current quality is strong, the situation will be reassessed following the weather event.

Snacking (Cherry,
Grape, Medley)

Availability decreased this week, resulting in higher price points. Despite the lighter volume, quality remains high across the entire snacking category.



Round	Crossing volumes through McAllen and Otay remain steady. Overall quality is reported as good.
Roma	Supply is currently excellent as growers begin harvesting new fields. Some price volatility is possible if the national market improves, though quality remains consistently good.
Grape	Lighter supply and increased demand from the East Coast have driven prices upward. This trend is expected to continue due to Florida's cold weather. Quality is outstanding.
Cherry	Supply levels are currently stable with good quality reported across the region.
Mixed Medley	Inventory has tightened this week. Upward price pressure persists as Florida's weather-related shortages force more demand into the Mexican market. Quality remains good.

FRUITS & VEGETABLES

	Avocados	Mexico's volume reached 95.5 million pounds in week two, with 71.1 million pounds exported to the U.S. The harvest consists of 90% main crop, showing 30% dry matter and peaking on 48s and 60s. Supply is currently better aligned with the high demand expected throughout January.
	Bananas	Expect tightening supplies in the near term as tropical production declines and global demand climbs. Growers are currently navigating virus pressure and rising costs, making consistent ordering essential for program stability. Current fruit quality remains high despite these emerging volume constraints.
	Pineapple	The market is stabilizing but remains undersupplied due to sustained high demand and firm pricing. While quality is good, buyers must remain flexible on size specifications to ensure consistent coverage while contracts are fulfilled.
	Table Grapes	The transition to South American new-crop fruit is complete, and storage stocks are exhausted. While pricing remains firm, the market is beginning to ease as volume increases. Green varieties, such as Sweet Globes, are currently the most limited but should see relief within the next 10 days; Red Globes and other varieties show excellent quality.
	Green Bell Pepper	Cooler temperatures have caused a dip in supply this week. However, product quality remains excellent across Nogales, McAllen, and South Florida.
	Color Bell Pepper	Volume is steady with good quality currently available through both McAllen and Nogales.
	Eggplant	Domestic production in Florida is stable, and crossings via Nogales remain robust. Quality from both regions is reported as very good.
	Cucumbers	Slicer: Crossings through Nogales and McAllen are steady with outstanding quality. While domestic volume is slowing due to cold weather, imports from Honduras are expected to begin next week. English: Supply remains consistent through Nogales and Canadian shipping points with good quality.



Green Beans

Florida supplies were limited this week following recent cold temperatures but are expected to recover over the next 14 days. Mexico is showing steady improvement, and quality remains strong.



French Beans

Guatemalan quality and production are strong. In contrast, Mexican availability is only fair as cooler temperatures continue to suppress yields.



Zucchini/ Yellow Squash

Cold weather in Florida and Nogales has lightened supplies and pushed market pricing higher. The best quality is currently found in Mexican crossings.



Fresh Herbs

Basil supply and quality are fluctuating due to winter temperatures, which may cause occasional tip burn. Tarragon remains in short supply with only fair quality. Italian Parsley and Cilantro are critically limited, and buyers should expect prorates from several growers.



Artichokes

Quality is good, but inventory is critically low. Large sizes are nearly unavailable, forcing substitutions with 12ct and 18ct packs. 24ct sizes have hit extreme price triggers, and shortages are expected to last through January.



Asparagus

Mexican production is increasing across most sizes except jumbo, while Peruvian volume remains steady. As the Mexican harvest expands, market activity is beginning to ease and prices are softening.



Bok Choy

Availability and quality are currently maintaining at marginal levels.



Broccoli/Crowns

Supplies are limited and harvesting is hampered by poor weather. While the general market has eased, Asian-cut crowns remain escalated, and organic broccoli is at an extreme trigger. Quality issues like pin rot and browning are persistent.



Broccolini/Sweet Baby Broccoli

Quality is high, but volume remains restricted. Growers are enforcing strict averages and potential prorates as weather continues to impact harvest yields.



Brussel Sprouts

While supplies are slowly improving, the market remains at extreme triggers due to insect pressure and internal browning. Expect prorates and strict allocations for the next 3–4 weeks.



Carrots

Persistent rain and muddy fields have severely restricted harvesting for baby, cello, and jumbo varieties. With Mexican volumes decreasing seasonally, expect limited availability and prorates for at least the next 2–3 weeks. Rainbow carrots remain the only steady variety.



Cauliflower

Current quality is good, but a significant tightening of supply is forecast for the coming weeks. Organic cauliflower has already reached extreme trigger levels.



Celery

Supplies are critically tight following recent storms. Expect prorates on value-added (VA) items and inconsistent quality as crews work through water-damaged fields.



Corn

A split market has emerged, with Florida pricing trending higher than Mexico due to cold weather. Quality is currently good, but Florida's outlook depends on the impact of upcoming frosts.



Fennel

Low field yields have triggered a supply shortage. Pricing is elevated, and many growers are reverting to 8-week order averages to manage limited inventory.

FRUITS & VEGETABLES



Kale

Availability is restricted and quality is marginal as inclement weather continues to disrupt harvest schedules.



Leeks

Overall quality and supply are currently holding at fair levels despite the escalated market status.



Garlic

Quality remains strong, though the current crop is becoming snug. Steady, consistent purchasing is recommended to ensure coverage for the remainder of the season.



Ginger

The market and supply levels remain stable with no immediate disruptions.



Green Cabbage

Supplies are healthy and product quality is reported as good.



Green Onions

Supplies are nearing total depletion for some growers due to previous heavy rains in Mexico. Expect strict allocations and prorates through the end of January as rain-impacted plantings result in poor yields.



Mushrooms

The market is following a typical holiday pattern of extremely high demand and light volume. Supply is expected to remain tight through the first of the year, though quality is good.



Napa Cabbage

Quality is high, but the market is rising as supplies tighten across the industry.



Parsley

Recent rainfall has reduced yields and impacted quality. Expect prorates specifically on Italian Parsley through the remainder of the month.



Red Cabbage

Quality is currently good, though total volume is trending on the lighter side.



Spinach

Volume is limited by disease pressure and mildew. Quality concerns—including wilting, discoloration, and weak texture—are expected to persist throughout January.



Snow Peas & Sugar Snaps

Quality and volume are currently suffering in the Yuma region, leading to strict allocations and potential prorates over the next 14 days. Conversely, Guatemalan imports are improving, and Mexican sugar snap supplies are plentiful despite limited availability of Mexican snow peas during field transitions.



Onions

The market is stable as shipments transition exclusively to Pacific Northwest storage stocks. Supply and quality are excellent, with pricing remaining buyer-friendly. No significant market shifts are expected for the remainder of the quarter.



Potatoes

Storage shipments will support the market for the rest of the year with no anticipated shortages. Norkotahs currently represent the bulk of the supply, while Burbank shipments are starting in low volumes. Expect a soft market to continue until late spring, when tighter supplies traditionally drive pricing higher.