



OVERVIEW:

Freezing temperatures and heavy rainfall across major growing regions in Florida and Mexico are drastically reducing yields, with growers currently evaluating significant crop damage. Supply chains face further disruption from a massive winter storm stretching from Texas through the Midwest and Deep South, while persistent wet fog in California's Central Valley continues to hinder morning harvest windows. Consequently, the industry is experiencing heightened market volatility and tightening availability for peppers, squash, and most tomato varieties, specifically Romas and snacking types.

The leafy green and brassica markets are particularly strained; cooling temperatures and mildew issues in Yuma have triggered limited supplies and potential prorates for lettuce, spinach, and arugula. Buyers should expect reduced case weights and shorter shelf lives through the end of February. Similarly, celery, carrots, green onions, and Brussels sprouts remain in critical shortage due to lost acreage and saturated fields that prevent crops from drying. While broccoli and cauliflower are escalating in price due to quality defects like pin rot and water spotting, the citrus market shows a split profile, with navel oranges and lemons trending heavily toward larger fruit sizes.

In the tropical and melon categories, avocados reached record-breaking volume in Week 3, though small sizes are tightening as demand peaks ahead of the Super Bowl. Guatemalan cantaloupes and honeydews show excellent quality and sugar levels, yet pineapple and banana supplies remain constrained by logistical, virus-related, and economic pressures. Limes are active with a shift toward smaller fruit, and while table grapes offer steady red varieties, green grapes remain the shortest in supply. Maintaining flexibility on sizing and consistent communication with shippers will be essential as these weather-driven gaps persist through the first quarter.

ALERT LIST:

ESCALATED

Anise/Fennel, Artichokes, Asparagus, Bok Choy, Broccoli, Broccoli Crowns Asian Cut, Cauliflower, Cilantro, Green Beans, Hot Pepper (Red Fresno, Habanero, Shishito), Leeks, Lettuce, Limes, Napa, Parsley Italian, Snow Peas & Sugar Snap Peas, Tomatoes (Romas and Snacking Tomatoes), White Asparagus

EXTREME

Blueberries, Boston/Butter Lettuce, Brussels Sprouts, Brussels Sprouts VA, Celery/Celery Sleeved, Green Onions, Spinach

WATCH LIST:

Bananas, Broccolini, Cabbage, Red, Florida Warm Veg (Corn, Cucumber, Eggplant, Bell pepper, Soft Squash), French Beans, Ginger, Herbs, Melons (Cantaloupe and Honeydew), Pineapple, Raspberries, Small Lemons, Small Oranges (138/113/88), Strawberries

BERRIES



Strawberries

California's fall crop is finishing, but spring plantings in Oxnard and Santa Maria are beginning to yield, ensuring consistent winter volume as weather improves. Baja's output is rising under favorable conditions, while Central Mexico has moved past its peak but maintains steady quality. In contrast, Florida's production has plummeted 50% following frost protection efforts; expect light supplies for at least two weeks until a sustained warming trend occurs.



Blackberries

Supplies from Central Mexico and Baja remain stable. While overall quality is high, recent humidity and temperature fluctuations have caused minor issues with fruit softness and color reversion.



Raspberries

Availability is decreasing as the Central Mexico and Baja seasons move past their peak. While quality is generally reliable, buyers may see some overripe or soft fruit due to recent rain and heat in the growing districts.



Blueberries

Supplies are tightening significantly as Central Mexican volume retreats from its seasonal peak. Despite the scarcity, Mexican fruit continues to outperform offshore options in both size and shelf life, with demand currently exceeding available inventory.

CITRUS



Limes

Heavy rainfall in Mexico, Colombia, and Peru has severely restricted yields and disrupted the size profile. Expect very limited availability of 175s and larger, as new crop production is peaking on 200s and smaller fruit. Quality is currently fair, with disease pressure impacting shelf life and appearance; volatility is projected through March.



Small Oranges

Inventories of small fruit are extremely low and expected to tighten further as persistent rain and fog hinder West Coast harvesting operations.

WEST COAST LETTUCE



Iceberg & VA

Yields are declining due to mildew damage and cap leaf issues, leading to lighter case weights and an active market. Quality remains inconsistent, with value-added (VA) packs showing signs of mildew and reduced shelf life. Market prices are forecasted to climb through February.



**Romaine,
Hearts & VA**

Supplies are currently adequate, but quality is impacted by bruising, mechanical damage, and mildew on outer leaves. Romaine heart material is specifically limited. VA products are showing increased core material and occasional mildew in bags.



**Better Burger,
Green & Red Leaf**

While availability has improved and quality is generally good, case weights remain light. Mildew and fringe burn remain present, though overall conditions are gradually stabilizing.

MELONS



Cantaloupe

Production remains steady with a favorable size profile, including a good mix of 9s, 12s, and jumbo fruit. Quality is strong with Brix levels ranging from 12–14%, though a volume decline is anticipated over the next two weeks as Guatemala transitions growing regions and Honduran imports decrease.



Honeydew

While overall volume has improved, 8-count fruit is nearly unavailable, representing only 1% of current production. Supply will remain challenging through late January, requiring flexibility on sizing. Expect good eating quality with Brix between 11–13%, though seasonal scarring and field dirt may be present.



Watermelon

Production in Guatemala has dropped significantly due to cooler temperatures, which has also shifted the size profile from 45s to 36s. Domestic Florida supplies are winding down and will remain unavailable until April, while Mexican crossings through Texas and Nogales remain steady with good quality.



TOMATOES – USA



Round & Roma

- Round: Markets are firming as the region prepares for a major winter storm. Expect increased volatility in February as Florida growers realize the full impact of recent freezes, including crop loss and bloom drop.
- Roma: Cold weather has slowed production and hindered color development, leading to much lighter supplies. Anticipate further tightening and price increases over the next several weeks due to frost damage.

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

Supplies were critically short this week with higher pricing. Damage assessments from the recent Florida cold snap are ongoing to determine the impact on future plantings.



TOMATOES – MX



Round	Volume remains steady through McAllen and Otay Mesa, with good quality reported on current crossings.
Roma	Cooler weather and increased demand have thinned supplies. The market is expected to remain firm this week, though overall quality remains high.
Grape	Prices are trending upward as East Coast buyers shift demand to Mexico following Florida's production shortfall. Quality is currently outstanding.
Cherry	Availability is lighter this week, resulting in higher price points. Quality remains consistent.
Mixed Medley	Supplies are tightening under heavy demand pressure from the East. Quality remains good despite the shrinking availability.

FRUITS & VEGETABLES



Avocados

Mexican shipments to the U.S. hit 83.6 million pounds for Week 3, with 48s and 60s remaining the primary sizes. The main crop now dominates 90% of the harvest, and dry matter has reached 30%. Production has been ramped up to meet the high demand typical for January.



Bananas

Inventory is projected to shrink as tropical yields drop and global demand rises. While current quality is high and volume is sufficient, the sector faces ongoing pressure from rising costs and viral issues. Stable ordering patterns are recommended to mitigate upcoming supply tightening.



Pineapple

The market is tight and demand is high. Flexibility on sizing is required to maintain supply.



Table Grapes

Quality is excellent. Markets are firm but easing as more fruit becomes available. Green grapes are currently the tightest.



Green Bell Pepper

Cooler temperatures have lowered yields across Nogales, McAllen, and South Florida, though fruit quality remains high.



Color Bell Pepper

Volume is down due to cold weather, but overall quality from McAllen and Nogales continues to be strong.



Eggplant

Florida volume is very light; Mexican crossings remain the best source for quality.



Cucumbers

Slicer & English: Florida supply is extremely limited; Nogales/McAllen volume is lighter due to cold. English prices have pushed higher.



Green Beans

The Florida freeze has decimated local supplies, causing prices to spike as growers evaluate crop loss. Mexican availability is also down due to cold weather, creating high demand and price pressure in Nogales. Quality is currently marginal.

French Beans

Supplies are fair, but container delays in Guatemala and cool weather in Mexico are slowing movement.



**Zucchini/
Yellow Squash**

Florida inventory is nearly exhausted, and Nogales crossings are light. Market prices have risen as a result, with the best quality currently found in Mexico.



Fresh Herbs

Basil and tarragon show inconsistent quality and limited volume due to winter weather.



Artichokes

Large sizes are extremely scarce, forcing substitutions into 12ct and 18ct. 24ct has reached an extreme trigger.



Asparagus

Mexican yields are improving and markets are easing, while Peruvian imports remain stable through month-end.



Bok Choy

Supplies and quality are currently acceptable, but the item remains on the escalated list due to regional weather.



Borccoli/Crowns

Quality is marginal due to pin rot and browning in Yuma. Supplies are tightening with prorates expected; Organic is at an extreme trigger.



**Broccolini/Sweet
Baby Broccoli**

Weather has hampered harvesting, keeping availability limited. Shippers are enforcing strict averages.



Brussel Sprouts

The market is fighting internal browning and insect pressure. Prorates of 30–40% are common; relief is 3–4 weeks away.



Carrots

Supplies are tight due to muddy fields and seasonal declines in Mexico. Availability will be restricted for 2–3 weeks with prorates expected.



Cauliflower

Availability is decreasing and the market is active. Organic cauliflower remains at an extreme level.



Celery

Storms have severely impacted acreage. Quality is inconsistent and VA items are subject to prorates.



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 caused a shortage. Pricing remains high with some 8-week averages in place.

FRUITS & VEGETABLES



Kale

Supplies are limited and quality is fair as weather continues to impact harvest windows.



Leeks

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



Garlic

Garlic inventory is snug but quality is good



Ginger

Ginger remains stable.



Green Cabbage

Supplies and quality are currently good.



Green Onions

Many growers are reporting total stock depletions following Mexican rains. Yields remain critical through January with strict allocations.



Mushrooms

High holiday demand is meeting lower volumes; expect light supply through the first of the year.



Napa Cabbage

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



Parsley

Recent rains have impacted yields. Prorates should be expected on Italian Parsley through January.



Red Cabbage

Quality is good, but overall supplies remain light.



Spinach

Spinach, Spring Mix, and Kale are facing heavy disease and mildew pressure. Expect weak texture and discoloration. These yield challenges, combined with limited harvestable acres, will persist through the end of the month.



**Snow Peas &
Sugar Snaps**

Cold weather in Guatemala and rain in Mexico have limited availability. Yuma quality is struggling.



Onions

The market is currently stable, with all shipments transitioning to storage supplies out of the Pacific Northwest. No significant price movement is expected through the quarter, as inventory remains plentiful and quality is consistent.



Potatoes

Supply for the rest of the year is fully supported by storage shipments, with strong availability and sizing across all categories. Norkotahs currently represent the bulk of the volume, while Burbanks are shipping in limited quantities. Similar to last season, markets are expected to remain soft until late spring.