



OVERVIEW:

Florida and Mexico maintain steady output under good conditions, though a cold front in Florida may drop temperatures through the holiday. Conversely, California and Baja strawberry harvests are delayed by heavy rain, forcing a shift to Florida and Central Mexico supply lines. Expect various label and pack substitutions as growers reroute product.

Tomatillos are in severe shortage with no peeled options and a shift toward smaller fruit. Green onions, celery, and Brussels sprouts face the most significant challenges; expect heavy prorates and limited availability through January. Ippolito is currently restricted to 50% of typical volume with zero jumbo sprout inventory. Additionally, broccoli and broccolini supplies have tightened due to pin rot and low yields, leading to price escalations.

California storage grapes have finished, leaving the market very thin until mid-January. Banana and lime markets are tightening due to increased global demand and weather-driven harvest delays. While pineapple remains limited, avocado supplies are stable despite holiday harvest breaks. In the citrus category, rain and fog are slowing operations. Small navel oranges are becoming scarce, making larger sizes a better substitution. Mandarins and lemons remain in good supply, while specialty oranges like Cara Cara and Blood varieties are just beginning their seasons.

Spinach, Italian parsley, and cilantro markets remain high and extremely tight. While baby leaf items show some improvement, anise, leeks, and napa cabbage continue to face quality and volume hurdles. California garlic is currently steady but will likely tighten as the season progresses.

ALERT LIST:

ESCALATED

Artichokes, Asparagus, Bok Choy, Broccoli, Fennel, Anise, Hot Pepper, Poblano, and Habanero, Kale, Leeks, Lettuce Iceberg, Cello, Limes, Napa, Parsley Italian, Red Leaf, Romaine Hearts, Romaine/VA Blends, Spinach, Strawberries, White Asparagus

EXTREME

Boston/Butter Lettuce, Brussels Sprouts, Brussels Sprouts VA, Celery/Celery Sleeved, Green Onions, Snow Peas & Sugar Snap Peas, Table Grapes, Tomatillo

WATCH LIST:

Bananas, Blueberries, Broccolini, Cabbage, Red, Cauliflower, French Beans, Herbs, Lettuce, Limes, Pineapple, Ginger, Melons - Cantaloupe and Honeydew, Mushrooms, Small Oranges

BERRIES



Strawberries

Harvests in California and Baja are delayed by recent rain, with more storms forecast this week. To ensure coverage, supply is being diverted from Central Mexico (loading through Texas) and Florida. Florida yields are currently low due to cold weather but should improve as temperatures rise. Consequently, expect temporary substitutions in labels or pack styles. While the California fall crop is ending, the new spring crop and upcoming Baja production are both showing good quality and should increase volume in early 2026.



Blackberries

Active production continues in Central Mexico and Baja with solid availability. While general quality is high, recent heat and humidity have caused some instances of soft fruit and color reversion.



Raspberries

Supplies have tightened as the season moves past its peak. While quality remains good, recent weather conditions have led to some overripe or soft fruit in current arrivals.



Blueberries

This item is on a watchlist despite steady production in Central Mexico. Current quality and sizing are very good, with consistent availability across all packs.

CITRUS



Limes

Supplies are tightening this week as holiday harvest schedules in Mexico limit availability. While larger fruit is currently accessible, volume will soon drop and quality may decline as the old crop finishes. The new crop is delayed by cool weather in Southern Mexico, leading to likely price and size fluctuations throughout January.



Small Oranges

This item is on a watchlist as small-sized fruit becomes increasingly scarce. Ongoing rain and fog are disrupting harvests, which is expected to further restrict inventory in the coming weeks.

WEST COAST LETTUCE



Iceberg & VA

Supply and quality remain fair, though weights are light. While the market is currently active, prices are expected to rise after the holidays. Growers are closely monitoring for soilborne diseases caused by recent heavy rains. VA: Quality and inventory levels remain good.



**Romaine,
Hearts & VA**

Quality is fair, but products are showing light weights, bruising, and fringe burn. Heart material is extremely limited. Recent weather continues to disrupt both harvest schedules and overall plant health. VA: Supplies are adequate and quality is fair, though persistent weather issues are impacting harvest consistency and shelf life.



Green & Red Leaf

Supplies are improving and quality is good, though carton weights remain light. Growers continue to manage mildew and fringe burn as conditions slowly stabilize following recent weather events.

MELONS



Cantaloupe

Production is down, with volume reserved almost exclusively for existing commitments. Open-market availability is very low. Sizing is currently dominated by 9s and jumbo 9s, while smaller fruit remains scarce. Despite a greener external appearance, the fruit is cutting well with high sugar levels between 12–14% Brix.



Honeydew

Supply is extremely limited due to rain and cool weather during the growing cycle. Inventory will remain challenging until roughly January 12. Buyers should expect scarring and surface dirt as typical seasonal defects and should remain flexible on size requirements.



Watermelon

Florida production is concluding and will not resume until April. Supply is currently being bridged by steady offshore arrivals from Guatemala and consistent crossings from Mexico through Texas and Nogales. Markets remain escalated and are expected to stay high through the holiday period.



TOMATOES – USA



Round & Roma

Round: Supply is abundant out of Ruskin and Palmetto, with high quality and aggressive pricing due to low demand. Roma: Inventory is tighter this week with inconsistent color, though overall quality remains good.

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

- Grape: Supply is steady and quality is high.
- Cherry: Availability is consistent with good quality.
- Medley: Supply remains limited, with volume expected to increase as favorable weather continue.



TOMATOES – MX



Round	Volume remains consistent through McAllen and Otay with high quality.
Roma	Supply is excellent as growers open new fields, though pricing may fluctuate based on national market demand.
Grape	Supply is stable and quality is good.
Cherry	Inventory is steady with good quality.
Mixed Medley	Volume is lighter this week, though quality is outstanding.

FRUITS & VEGETABLES



Avocados

U.S. volume is robust, nearing a record 3-billion-pound annual consumption mark. Current fruit peaks at 48s and 60s with high dry matter. While seasonal rain has caused more skin lenticel, internal quality remains unaffected. Mexican harvests are temporarily light due to the holidays but will increase next week to meet strong January demand, with steady pricing across all sizes.



Bananas

Tropical production declines while global demand climbs. Virus pressure and rising production costs are tightening the market, though current quality is very good. Consistent ordering patterns are essential to maintain supply stability through these regional pressures.



Pineapple

The market is stabilizing slightly but remains tight under high demand and firm pricing. To ensure supply chain stability, flexibility on size specifications is necessary as shippers prioritize contract integrity. Overall quality and flavor remain high.



Table Grapes

Supply is in an extreme shortage as California storage fruit has finished and offshore arrivals remain limited. This week represents the tightest availability of the season. Expect markets to remain strained through New Year's, with relief anticipated mid-month as vessel volumes increase. Consider using cut fruit as a substitute or reducing portions until inventory improves.



Green Bell Pepper



Color Bell Pepper

Volume is increasing as Nogales crossings ramp up for both open field and hothouse varieties. With the desert season concluded and the transition complete, pricing is expected to ease over the next ten days. Quality remains high for all colors.



Eggplant

Supply remains strong and quality is very good out of Florida and Nogales.



Cucumbers

Slicer: Inventory is steady through Nogales and McAllen with excellent quality. As Georgia production ends due to crop loss, domestic supply is shifting entirely to South Florida. English: Supply remains consistent through Nogales and Canada with good quality.



Green Beans

Demand has dipped post-holiday while Mexican supply remains stable. Florida production may slow due to this week's cold front, but the long-term January outlook remains steady with good quality.

French Beans

This item is on a watchlist. Guatemalan output and quality are strong, while Mexican availability is fair despite some recent quality inconsistencies.



**Zucchini/
Yellow Squash**

Inventory is stable and quality is good across Florida, McAllen, and Nogales.



Fresh Herbs

This category is on a watchlist. While basil production is strong, heat has caused some quality issues. Chervil remains limited due to weather in Ecuador, and sage is tight due to regional growing challenges. Italian parsley is the most restricted, with extreme shortages and prorates expected.



Artichokes

Supply is extremely limited with large sizes nearly unavailable; growers are substituting 12ct and 18ct where possible. Expect these constraints to last through January. While quality remains good, 24ct sizes have hit extreme trigger levels.



Asparagus

Mexican output has slowed due to weather and logistics, keeping the market tight through January. While Peruvian volume is steady, the profile is shifting toward smaller fruit as southern regions wind down. Potential relief from the Caborca region depends entirely on upcoming weather.



Bok Choy

Inventory and quality are currently fair.



Borccoli/Crowns

Markets have escalated as supplies remain critically low. Quality is being hampered by pin rot, browning, and insects, leading to ongoing prorates. Organic broccoli is currently at extreme trigger levels.



**Broccolini/Sweet
Baby Broccoli**

This item is on a watchlist as weather continues to hinder harvests. Growers are adhering to strict averages, and prorates are expected through the end of the year.



Brussel Sprouts

Supply is in an extreme shortage with growers fulfilling only 50% of averages. Internal browning and insect pressure are affecting yields. Relief is not expected until Mexican production gains momentum in early January.



Carrots

Rain and muddy fields have tightened availability for Jumbos, Mediums, and Cellos. While Rainbow carrots are stable, standard varieties are limited as Mexican volume decreases seasonally. Early ordering is highly recommended.



Cauliflower

This is on a watchlist; while conventional supply and quality are good, organic cauliflower has reached extreme levels.



Celery

Supply is in an extreme deficit during a period of high holiday and seasonal demand. Recent storms have further disrupted harvests, and severe prorates are expected. Quality remains only fair.



Corn

Volume is lighter from both Florida and Mexico, causing prices to firm up despite good quality.



Fennel

Shortages persist due to low field yields. Pricing remains high, and some growers are restricted to 8-week averages.

FRUITS & VEGETABLES



Kale

Inventory is limited and quality is fair as weather-related disruptions continue to impact harvest schedules.



Leeks

Current supply and quality are acceptable.



Garlic

Quality is high, but the market is snug. Steady, consistent purchasing is advised to ensure coverage for the remainder of the season.



Ginger

Both market pricing and inventory levels remain stable.



Green Cabbage

Supplies are tight but slowly recovering. Yields remain a challenge through the holidays due to weather-impacted harvests.



Green Onions

The market is in an extreme state with some growers reporting zero inventory. Heavy rains in Mexico have severely damaged plantings, and prorates will continue through the end of January.



Mushrooms

Low volume. Inventory will remain light through the first of the year, though quality is currently good.



Napa Cabbage

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



Parsley

Recent rain has halted harvests, leading to supply gaps and expected prorates. Yields will remain a challenge through January as growers work to catch up.



Red Cabbage

This is on a watchlist with good quality but limited availability.



Spinach

Supply remains restricted with reports of discoloration, wilting, and weak texture. Weather-driven yield challenges are expected to persist into January.



**Snow Peas &
Sugar Snaps**

his category remains at an extreme status. While Guatemalan volume is building, Peruvian production is ending and Mexican supply remains limited due to seasonal transitions.



Onions

The market is stable with all shipments now coming from Pacific Northwest storage. Supply, quality, and pricing remain favorable for buyers, and no significant shifts are expected through the end of the year.



Potatoes

Storage shipments are fully supporting current needs with strong sizing and availability. Norkotahs remain the primary variety, while Burbanks are shipping in limited volume. The market is expected to remain soft until late spring.