



OVERVIEW:

Severe supply disruptions and weather-related crop damage have created a volatile market, with the most critical shortages currently impacting leafy greens and brassicas. Record temperatures and disease in Yuma have decimated lettuce and tender leaf acreage, leading to potential 50% prorates on broccoli and cauliflower. These shortages, alongside storm-damaged celery and carrot crops, are expected to persist until March. Additionally, freezing temperatures in Florida and Mexico have sharply reduced volumes for warm-weather staples like tomatoes, peppers, and squash, while the asparagus season faces a severe gap due to Peruvian closures and regional cooling.

Logistical hurdles further complicate these production issues, as equipment and driver shortages struggle to meet high demand. While fruit availability is generally more stable, the inventory is skewed heavily toward larger sizes. This trend is prominent across avocados, citrus, and pineapples, where small-diameter fruit is increasingly scarce. Table grapes and limes remain accessible, but buyers should prepare for tightening banana and melon supplies as global demand rises and seasonal arrivals from Guatemala slow. Maintaining supply will require significant flexibility in sizing and a pivot toward larger-grade specifications across nearly all categories.

ALERT LIST:

ESCALATED	EXTREME
Bok Choy, Boston/Butter Lettuce, Broccolini, Cilantro, Fennel, Anise, Green Leaf, Hot Pepper (Red Fresno, Habanero, and Shishito), Leeks, Limes, Napa, Parsley Italian, Snow Peas & Sugar Snap Peas, Strawberries, Sweet Corn, Tomatillos, Tomatoes (Mexico: Rounds, Romas, and Snacking), White Asparagus	Asparagus, Blueberries, Broccoli/Florets/Crowns, Brussels Sprouts, Brussels Sprouts VA, Cauliflower, Celery/Celery Sleeved, Green Beans, Green Onions, Lettuce, Lettuce Cello/Wrapped, Romaine Hearts, Spinach, 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



Supply is critically low due to weather-driven harvest halts. California's momentum was interrupted by heavy rain, with more storms forecast to delay volume. Florida production has dropped significantly following multiple freezes, resulting in some water and frost damage.



Central Mexico and Baja maintain steady production. Overall quality is good, though heat and humidity have caused minor issues with fruit softness and color reversion.



Availability is dropping as the season moves past peak volumes in Central Mexico and Baja. Quality remains generally high, though recent humidity and heat have led to some overripe fruit.



Demand is currently outpacing supply. As Mexican and South American seasons wind down, volumes are thinning. Potential freeze damage to Florida's early spring crop is expected to keep the market extremely limited for several weeks.

CITRUS



Limes

Supplies remain steady from Mexico, Colombia, and Peru. While current inventory favors smaller fruit, rainfall in Southern Mexico is beginning to increase the availability of larger sizes. Quality is currently fair, with disease issues impacting both shelf life and appearance; expect pricing and sizing volatility through March.



Small Citrus

Inventory for small-diameter fruit is extremely restricted across all varieties. To ensure consistent supply, prepare for substitutions with larger-sized fruit.

WEST COAST LETTUCE



Iceberg & VA

The market is in a state of extreme shortage. Yields are low and weights are light due to persistent mildew and cap leaf damage. Expect fluctuating quality, rising prices, and significantly shortened shelf life as weather continue to hamper harvests. VA: Volume and quality are inconsistent. Recent reports indicate issues with mildew and reduced shelf life within processed bags.



Romaine, Hearts & VA

Availability is tightening as the market trends upward. Issues include fringe burn, bruising, light weights, and mildew on outer leaves. Romaine Hearts have reached extreme trigger levels, with growers now restricting orders to historic averages. VA: Supplies are adequate but quality is affected by the presence of mildew and increased core material in the packs.



Better Burger, Green & Red Leaf

Supplies are currently holding, though Green Leaf has moved to escalated status. Carton weights remain light, and fields are showing signs of fringe burn and mildew as the broader lettuce market trends toward higher pricing.

MELONS



Cantaloupe

Availability is currently balanced between 9s and 12s, with 12s and 15s starting to increase in volume. Quality remains high with sugar levels consistently between 12-14%.



Honeydew

Production is heavily skewed toward 5s and 6s, which currently account for nearly all arrivals. Smaller 8-count fruit is extremely limited. As growing regions transition, overall volume will dip for the next two weeks, making sizing flexibility essential.



Watermelon

Prices for seedless melons are rising as Mexican crossings slow and cool weather in Guatemala reduces yields. Fruit sizing has shifted toward 36s, and upcoming Florida production remains at risk following recent freezing temperatures.



TOMATOES - USA



Round & Roma

The market is in an extreme shortage following freeze damage, with volatility expected to persist through early May. Supply will be inconsistent as growers attempt to salvage remaining crops. Expect mandatory substitutions of sizes and varieties to maintain inventory.

Snacking (Cherry, Grape, Medley)

Grape, Medley, and Cherry varieties are at extreme trigger levels with very high pricing. While grape tomato volume showed a slight increase this week, all other snacking varieties remain critically short.



TOMATOES - MX



Round	Supply is slowly increasing, but heavy demand from the East Coast is offsetting these gains and driving FOB prices significantly higher. Quality remains very good for crossings through McAllen and Nogales.
Roma	Volume is trending upward, though the market remains escalated due to high eastern demand. While pricing is strong, the quality of current inventory in McAllen and Nogales is outstanding.
Grape	Supply has lightened while demand from the East Coast remains high, driving prices upward. Despite the tighter volume, quality is currently outstanding.
Cherry	Availability is constrained as more volume is diverted to cover Eastern losses. Expect the market to remain strong with higher pricing, though overall quality remains high.
Mixed Medley	Supplies are currently escalated as lighter yields and intense demand from the East Coast push the market higher. While the inventory is tightening, the quality remains excellent. Expect pricing to stay elevated as the market reacts to the production gaps in Florida.

FRUITS & VEGETABLES



Avocados

Mexico recently harvested 62.2 million pounds, shipping 56.6 million to the U.S. Fruit is peaking at 48s and 60s counts with dry matter at 32%. While volume is plentiful, expect occasional lenticel spotting due to seasonal rainfall.



Bananas

Inventory is tightening as tropical production dips and global demand climbs. Rising costs and virus pressures are straining the supply chain. While current quality is high, proactive ordering is necessary to manage declining yields.



Pineapple

The market is stabilizing but remains constrained by high demand. Pricing is steady and contracts are being met, though flexibility on fruit size is mandatory to ensure consistent delivery.



Table Grapes

Availability is stable across all three colors with exceptional quality and high sugar content. Key varieties include Sweet Globes, Red Globes, and Sweet Flavor, alongside various generic options.



Green Bell Pepper

Availability in South Florida is extremely scarce following freeze losses, causing prices to spike. While Mexico is seeing better volume and very good quality, expect the market to remain volatile through March.



Color Bell Pepper

Cooler weather has led to lighter volumes. However, overall quality remains high for supplies crossing through McAllen and Nogales.



Eggplant

Domestic volume from Florida is nearly non-existent due to the freeze. Crossings through Nogales remain strong, with the best quality currently coming out of Mexico.



Cucumbers

Supply is improving as new production areas open in Nogales and McAllen, yielding outstanding quality. Shipments from Honduras are expected to begin within the next two weeks. English: Lighter volume and steady demand have driven prices upward. Quality remains good for current crossings in Texas and Arizona.



Green Beans

Florida production is at a standstill following heavy freeze losses, leading to an immediate price jump and fair quality. Lighter yields in Mexico due to cool weather are further straining the market, with extreme volatility expected for several weeks.



French Beans

Guatemalan production is steady, but East Coast arrivals are inconsistent due to vessel delays. Mexican yields are fair but remain suppressed by cooler temperatures.



Zucchini/ Yellow Squash

The combination of Florida's freeze and lighter crossings through Mexico has created a severe shortage. Markets are trending higher, with the best available quality currently originating from Mexico.



Fresh Herbs

Heavy rain in Colombia and USDA inspection delays are impacting basil and rosemary. Mexican basil shows inconsistent quality and occasional tip burn. Additionally, chervil remains limited, while arugula and cilantro are seeing extreme shortages and grower prorates.



Artichokes

Supplies and quality are healthy. While large-diameter fruit is still less common, overall availability is trending upward.



Asparagus

The market is in an extreme shortage. Mexican yields are suppressed by cold weather, and the Peruvian season is essentially finished until late March. Expect very tight supply, size substitutions, and prorates for the next two to three weeks, particularly on larger sizes.



Bok Choy

Volume and quality are currently adequate, though the market remains on escalated status.



Broccoli/Crowns

Supply is extremely tight with prorates reaching up to 50%. Recent rain and heat in Yuma have triggered persistent issues with pin rot and browning. Growers are strictly enforcing order averages to manage the limited inventory.



Broccolini/Sweet Baby Broccoli

While quality is good, harvesting has been hampered by weather, leaving most growers with very limited stock. Prorates are expected as the market remains escalated.



Brussel Sprouts

Internal browning and insect pressure continue to limit yields, keeping the market at extreme trigger levels. While conditions are expected to improve within the next two weeks, growers are still restricting orders to historical averages.



Carrots

Muddy fields from persistent rain have made harvesting baby, cello, and jumbo carrots extremely difficult. While rainbow carrots remain stable, supply for other varieties is limited and subject to prorates for the next 2-3 weeks. Georgia currently has jumbo availability for those able to shift logistics.



Cauliflower

Market conditions remain at extreme trigger levels. While quality is currently acceptable, inventory has tightened significantly across all regions.



Celery

The market is in an extreme shortage due to weather-disrupted harvests. Expect prorates on value-added items, while carton celery is being restricted to historical averages. Full relief is not anticipated until April.



Corn

Florida is facing extreme price hikes and significant crop losses from recent freezes, with some growers reporting total losses for the winter cycle. While Mexican supply is stable, high demand is driving prices up; volatility is expected through April.



Fennel

Low field yields have created a supply shortage. Pricing remains escalated, and growers are enforcing strict 8-week order averages or implementing prorates.

FRUITS & VEGETABLES

	Kale Supply is constrained and quality is only fair. Persistent weather issues continue to hamper harvesting schedules and overall output.
	Leeks The market is currently escalated. While quality and volume appear stable for now, the inventory remains under pressure.
	Garlic Quality is consistent, but the overall crop remains snug. Steady, consistent purchasing is recommended to maintain inventory through the year.
	Ginger Both market pricing and supply levels remain steady with no immediate disruptions.
	Green Cabbage Currently on the watchlist. While quality is good, the market is tightening, and a further decrease in availability is expected by March.
	Green Onions Supplies are extremely limited due to previous rain in Mexico and industry-wide weather disruptions. Expect poor yields, strict order averages, and prorates to continue through early March.
	Mushrooms Supply and quality are both stable. No significant changes in availability are expected over the coming weeks.
	Napa Cabbage Availability has tightened, causing the market to trend upward. Despite the shortage, current quality remains high.
	Parsley Inventory is healthy and quality is good; no supply issues are reported for either variety.
	Red Cabbage Added to the watchlist due to light supplies, though the current quality of available product is good.
	Spinach Both categories are at extreme trigger levels. Yields are being decimated by disease, mildew, and weak texture. Expect limited availability and quality issues like discoloration and wilting.
	Snow Peas & Sugar Snaps Heavy rain in Northern Mexico and freezes in Guatemala have sharply reduced production. Supply will remain limited for the next two weeks until the Baja season begins to provide relief.
	Onions The market is stable with all shipments originating from Pacific Northwest storage. Plentiful availability and steady pricing are expected to favor buyers for the remainder of the quarter.
	Potatoes Supply is fully supported by storage shipments with no major challenges in sizing or availability. The market is expected to remain soft until late spring when traditional seasonal tightening usually occurs.