


OVERVIEW:

Freezing temperatures and heavy rainfall across Florida and Mexico have significantly reduced production, leading to tightened inventories and market instability. While demand remains high, quality is inconsistent across several commodities. Specifically, tomatoes, squash, bell peppers, and hot peppers face immediate shortages. Logistics are equally strained, with high demand and weather-related delays creating a deficit of available trucks.

In the berry and melon categories, strawberries are transitioning between regions, with Florida volumes currently depressed by cold while Baja production climbs. Cantaloupe and honeydew from Guatemala show strong quality and sugar content. Conversely, the pineapple market is lean, requiring size flexibility, and banana supplies are expected to shrink due to economic and viral pressures in tropical regions. Avocado volume is robust ahead of the Super Bowl, favoring larger fruit, while the lime market is active but limited on large sizes.

The leafy green and vegetable sectors are under severe duress. In Yuma, previous weather damage has triggered widespread mildew and frost issues, particularly affecting spinach, arugula, and lettuce. Expect reduced case weights, prorates, and shortened shelf life through mid-February. Similar shortages persist for celery, carrots, Brussels sprouts, and green onions due to storm-damaged fields and harvesting delays caused by persistent fog. Broccoli and cauliflower have also reached critical supply levels, characterized by water spotting and smaller sizing.

Citrus availability varies by variety and region. California lemons and navel oranges are accessible, though small-sized fruit remains scarce across most orange varieties, including Cara Caras and Minneolas. Texas is transitioning to late-season navels, while grapefruit supplies in both Texas and California remain steady on larger fruit. Despite some harvest delays from lingering fog, mandarins and specialty citrus like blood oranges are currently moving into the supply chain.

ALERT LIST:
ESCALATED

Anise, Asparagus, Beans, Bok Choy, Boston/Butter Lettuce, Broccolini, Cauliflower, Cilantro, Corn, Cucumber, Eggplant, Fennel, Green Beans, Hot Pepper (Red Fresno, Habanero, Shishito), Leeks, Lettuce, Limes, Napa, Parsley Italian, Snow Peas, Soft Squash, Strawberries, Sugar Snap Peas, Tomatillos, Tomatoes (Rounds, Romas, Snacking), Warm Veg Category (Florida), White Asparagus

EXTREME

Blueberries, Broccoli/Florets/Crowns, Brussels Sprouts, Brussels Sprouts VA, Celery/Celery Sleeved, Green Onions, Lettuce Cello/Wrapped, Spinach

WATCH LIST:

Bananas, Cabbage (Red), French Beans, Ginger, Herbs, Lemons (Small), Melons (Cantaloupe and Honeydew), Oranges (Small 138/113/88), Pineapple, Raspberries

BERRIES

Strawberries

Supply is tightening as production transitions between regions. California's fall crop is finishing, while new spring plantings are starting to ramp up. Baja volume is increasing, but Central Mexico has passed its peak. Florida production is currently down 50% due to cold, with upcoming freeze risks likely to keep volumes low in the short term.


Blackberries

Inventory remains steady out of Central Mexico and Baja. While quality is generally good, recent heat and rain have caused minor softness and occasional color reversion.


Raspberries

Availability is decreasing as Central Mexico and Baja move past peak production. Quality remains stable, though heat and humidity have led to some reports of overripe fruit.


Blueberries

Market remains critical. Central Mexico supplies are dropping as the season moves past its peak. While Mexico's quality and sizing are currently superior to offshore options, overall volume is trending down.

CITRUS



Limes

Supply is steady across Mexico, Colombia, and Peru, though currently heavy on smaller fruit. Southern Mexico rain is slowly increasing the availability of larger sizes. Quality remains fair with some disease affecting shelf life; expect price and size volatility through March.



Small Oranges

Inventory is very low and expected to tighten further as rain and fog hinder West Coast harvesting.

WEST COAST LETTUCE



Iceberg & VA

Supplies are tight with light weights and active markets. Mildew damage and cap leaf issues are lowering yields and causing inconsistent quality. Cello/Wrapped product is at extreme levels. Expect shortened shelf life and hit-or-miss quality through February. VA: Inventory and quality are currently mediocre. Recent reports indicate issues with mildew present in the bags and a significantly shortened shelf life.



Romaine, Hearts & VA

Volume is limited with reports of bruising, fringe burn, and mildew. Romaine Heart material is specifically scarce, and growers are strictly enforcing volume averages. VA: Supplies remain adequate but quality is inconsistent. Expect to see an increase in core material within the packs along with occasional mildew due to recent weather conditions.



Better Burger, Green & Red Leaf

Supplies for Green, Red, and Better Burger leaves have improved, though weights remain light. Mildew and fringe burn continue to be a factor despite improving conditions.

MELONS



Cantaloupe

Availability is good for 9s and 12s, while 12 and 15 counts remain tight. Inventories are beginning to replenish following winter storm delays across the US. Quality is strong with Brix levels ranging from 12–14%.



Honeydew

Production has improved, though 8ct fruit represents only 1% of total volume. Anticipate supply challenges as growing regions transition in two weeks, with recovery expected by late February. Size flexibility is necessary. Quality is good with Brix levels at 12–13%.



Watermelon

Seedless markets have risen due to lower Mexican production and significant drops in Guatemalan volume caused by cooler weather. Sizing has shifted from 45s to 36s. Mexican shipments via Texas and Nogales are slower due to transportation delays.



TOMATOES – USA



Round & Roma

Markets are tightening as cold weather slows production in Immokalee and Homestead. Demand is expected to exceed supply for mature greens and vine-ripes over the next 10 days. The extreme cold forecast for South Florida this weekend will likely drive further volatility and supply gaps next week.

Snacking (Cherry, Grape, Medley)

Grape, Medley, and Cherry varieties are in very short supply with elevated pricing. Damage assessments from recent cold weather are ongoing, and this weekend's freeze in South Florida poses additional risks to future plantings and availability.



TOMATOES - MX



Round	Volume has dropped sharply following last week's rain and cold, coupled with surging demand from the East Coast. While FOB prices have increased significantly, quality remains very good for shipments crossing through McAllen and Nogales.
Roma	Cooler temperatures and high East Coast demand are keeping supplies light and markets firm. Quality remains stable for crossings through McAllen and Nogales.
Grape	Lighter supply and higher demand from the East have pushed prices up. This trend is expected to persist due to Florida's weather conditions. Quality remains outstanding.
Cherry	Volume is limited as demand from the East increases. Pricing is trending higher in line with the broader snacking category. Quality is excellent.
Mixed Medley	Availability is tighter this week. Increased demand and weather-related transitions are driving costs up. Quality is outstanding.

FRUITS & VEGETABLES

	Avocados	Mexico harvested 85.7 million pounds last week, shipping 77.5 million to the U.S. The main crop represents 90% of volume, with dry matter at 31% and sizing peaking on 48s and 60s. Demand is rising sharply ahead of the Super Bowl.
	Bananas	Supply is tightening due to lower tropical yields, virus pressure, and higher production costs. While current quality is high and volume is adequate, expect restricted availability as global demand increases.
	Pineapple	The market remains tight despite slight stabilization. High demand is holding prices steady. Quality is good, but size flexibility is required to maintain consistent supply levels.
	Table Grapes	Inventory is stable across all colors with excellent quality and high Brix levels. Current varieties include Sweet Globe (Green), and Red Globe or Sweet Flavor (Red), alongside standard generic options.
	Green Bell Pepper	Supply is lighter this week due to cold weather. Quality remains very good, but the upcoming freeze in South Florida may impact next week's market.
	Color Bell Pepper	Cooler weather has led to lighter volumes, though quality from McAllen and Nogales remains high.
	Eggplant	Florida supply is very light due to cold, while Nogales crossings remain strong. Best quality is currently coming from Mexico.
	Cucumbers	Slicer: Cooler weather has lightened supply through Nogales and McAllen. Florida supply is extremely limited; Honduran shipments are expected in 7 to 14 days. English: Lighter supply and moderate demand have increased pricing. Quality remains good.



Green Beans

Supply is very short following the Florida freeze, with markets jumping several dollars. Mexico is also seeing lighter availability. Quality is currently fair.



French Beans

Guatemalan supplies are fair to good, while Mexican yields continue to be impacted by cool weather.



Zucchini/ Yellow Squash

Supply is very short in Florida and light in Nogales. Quality is best out of Mexico, but prices are trending higher.



Fresh Herbs

Basil and Tarragon quality and supply are inconsistent due to weather. Arugula, Italian Parsley, and Cilantro are extremely limited with prorates expected.



Artichokes

Quality is good, but supplies remain limited. Growers are strictly holding to averages and substituting sizes where possible. Large sizes are extremely tight, with 12ct and 18ct being the primary substitutes. These sizing constraints are expected to last through mid-February.



Asparagus

Cooler temperatures in San Luis and Caborca have slowed Mexican production, while Peruvian volume continues its seasonal decline. Market activity has softened as the transition to Mexico coincides with lower winter demand across the U.S.



Bok Choy

Quality and supplies are currently adequate.



Borccoli/Crowns

Supplies have tightened and quality is inconsistent. Previous rain and warmth in Yuma have caused ongoing browning and pin rot issues. Expect prorates and strict averages for the next several weeks.



Broccolini/Sweet Baby Broccoli

Quality is good, but inventory is extremely limited across most growers. Weather has disrupted harvest schedules and volume. Prorates are expected as growers hold to strict averages.



Brussel Sprouts

Supplies are tight but slowly improving. Growers are still managing insect pressure and internal browning. While the market remains at an extreme trigger, relief is expected in 2 to 3 weeks.



Carrots

Rain and muddy fields have made harvesting difficult, resulting in limited availability for Baby, Cello, and Jumbo carrots. Mexican volumes are also decreasing. Expect prorates for the next 2 to 3 weeks. Jumbo supply is available in Georgia for those able to load there. Rainbow carrots remain steady.



Cauliflower

Supplies are tightening, and the market is expected to remain escalated for several weeks. Organic cauliflower has reached extreme levels.



Celery

Inventory is extremely tight due to weather-related harvest disruptions. Quality is mediocre, and prorates on VA items are expected through mid-February as growers work through affected acreage.



Corn

A split market exists this week, with Florida pricing higher than Mexico. While quality is currently good in both regions, Florida's recent cold weather may impact future availability and quality.



Fennel

Low field yields have created a supply shortage. Pricing is escalated, and some growers are enforcing 8-week averages with occasional prorates.

FRUITS & VEGETABLES

	Kale	Weather has hindered harvesting, leading to limited supplies. Quality is currently fair.
	Leeks	Quality and supplies are currently stable.
	Garlic	Quality is good, though the current crop remains snug. Steady purchasing is recommended to ensure consistent inventory.
	Ginger	Market and supplies are holding steady.
	Green Cabbage	Both quality and supply remain in good standing.
	Green Onions	Inventory is critically low industry-wide, with some growers reporting total depletion. Previous rain in Mexico and recent weather continue to hinder yields. Expect strict averages and prorates for at least two weeks, with challenges persisting through mid-February.
	Mushrooms	High demand is outpacing light supplies. Quality remains good, and volume is expected to stay limited through the start of the year.
	Napa Cabbage	Quality is strong, but inventory is tightening and market pricing is on the rise.
	Parsley	Recent rains have disrupted harvests and quality. Italian Parsley is subject to prorates, and yields are expected to remain under pressure through the end of the month.
	Red Cabbage	Supply is currently light, though quality remains good.
	Spinach	Yields are severely impacted by disease, mildew, and weak texture. Expect limited availability and quality challenges including discoloration and wilting through the end of January.
	Snow Peas & Sugar Snaps	Guatemalan snow pea volume has improved, but sugar snaps remain affected by cold weather. Both varieties remain limited out of Mexico due to recent rain and low temperatures.
	Onions	The market is stable with shipments moving exclusively from Pacific Northwest storage. Supply and quality are high, and pricing remains favorable for buyers with no major movement expected through the quarter.
	Potatoes	Storage shipments are fully supporting demand with no anticipated challenges. Sizing and availability remain strong across all categories. The market is expected to remain soft until late spring.