



OVERVIEW:

Mexico's production has noticeably softened while demand remains robust, creating a landscape of mixed quality and tightening availability for hot peppers, bell peppers, squash, and tomatoes. Freight constraints are compounding these challenges, as shipping lanes are heavily impacted by recent weather delays and acute equipment shortages. While red table grapes offer steady volume and outstanding quality, green varieties are lagging significantly; conversely, the lime market has stabilized slightly, though volatility is still anticipated through the first quarter. Banana supplies are contracting due to complex global pressures, whereas melon imports from Guatemala are showing consistently improved quality and sugar content. Pineapple inventory remains restricted, necessitating flexibility on sizing, while avocado volumes remain healthy following the Super Bowl push, albeit with a scarcity of smaller fruit and some rain-related lenticel presence.

Strawberry supplies are currently strained by the seasonal transition between growing regions and elevated holiday demand, with recovery in Florida and Mexico dependent on stabilizing weather patterns. In Yuma, record heat and widespread mildew have severely impacted leafy greens, leading to extreme shortages, potential prorates, and reduced shelf life for lettuce, spinach, and spring mix through mid-February; furthermore, the Yuma season is predicted to finish two weeks ahead of schedule. Similar scarcity applies to root vegetables, including carrots, celery, and green onions, where weather damage is forcing strict allocation and limiting recovery until late in the month. Cruciferous vegetables are also struggling, with broccoli and cauliflower hitting critical shortage levels due to quality defects like pin rot. Finally, the citrus market is characterized by a widespread shortage of smaller fruit; while large lemons and navel oranges are accessible, buyers should generally expect to size up across most categories to secure volume.

ALERT LIST:

ESCALATED

Asparagus, Bok Choy, Boston/Butter Lettuce, Broccolini, Cilantro, Fennel (Anise), Hot Pepper (Red Fresno, Habanero, and Shishito), Leeks, Limes, Napa, Parsley Italian, Romaine/Romaine Hearts, Snow Peas & Sugar Snap Peas, Strawberries, Sweet Corn, Tomatillos, Tomatoes (Mexico: Rounds, Romas, and Snacking), White Asparagus

EXTREME

Blueberries, Broccoli/Florets/Crowns, Brussels Sprouts, Brussels Sprouts VA, Cauliflower, Celery/Celery Sleeved, Green Beans, Green Onions, Lettuce, Lettuce Cello/Wrapped, Spinach, Tomatoes (Florida: Rounds, Romas, and Snacking), Warm Veg Category (Florida: Corn, Beans, Cucumber, Soft Squash, Bell Pepper, Eggplant)

WATCH LIST:

Bananas, Red Cabbage, French Beans, Herbs, Small Lemons, Pineapple, Ginger, Cantaloupe, Honeydew, Raspberries, Small Oranges

BERRIES



Strawberries

Valentine's Day demand is heavily outpacing supply, aggravated by seasonal transitions and recent weather disruptions. Florida production has plummeted following recent frosts, with recovery stalled until warmer patterns return. Conversely, California's shift from fall to spring crops is timing out well to support winter availability, and Baja volumes are steadily increasing. Central Mexico remains consistent but is naturally tapering off following its recent harvest peak.



Blackberries

Central Mexico and Baja are providing steady availability. While the fruit quality is generally sound, recent fluctuations in heat and humidity have triggered occasional issues with softness and red cell reversion.



Raspberries

Supplies are tightening as Central Mexico and Baja move past their seasonal production peaks. The market requires monitoring, as recent rain and humidity have led to sporadic reports of soft or overripe fruit despite overall good quality.



Blueberries

Availability is contracting as Central Mexico volumes trend downward from their seasonal high. Despite the scarcity, Mexican fruit continues to offer superior sizing and quality compared to the offshore imports currently circulating in the market.

CITRUS



Limes



Small Citrus

Imports from Mexico, Colombia, and Peru remain steady, with the current yield skewing heavily toward smaller sizes. However, recent rainfall in Southern Mexico is helping improve the volume of larger fruit as the new crop progresses. Quality is currently average due to some disease pressure affecting shelf life, and market volatility regarding pricing and sizing is projected to persist through March.

Availability of small-count fruit is critically low industry-wide. Consequently, strict substitutions with larger sizes should be expected to maintain order volume.

WEST COAST LETTUCE



Iceberg & VA



**Romaine,
Hearts & VA**



**Better Burger,
Green & Red Leaf**

Market activity is surging as weather disruptions and mildew damage severely cut into yields. Buyers should anticipate light weights, inconsistent quality, and reduced shelf life as the crop struggles with cap leaf issues. VA: Processed options are struggling with average quality, facing similar challenges regarding shelf life duration and occasional mildew detection in bags.

Growers are shifting to strict allocation as bruising, fringe burn, and mildew impact yield. Heart availability is particularly thin due to a lack of suitable raw product, and carton weights are trending light. VA: Supply is holding, but quality reports indicate higher core content in bags and sporadic mildew issues affecting the finished pack.

Conditions are recovering, bringing better availability and quality. However, light carton weights persist alongside lingering issues with mildew and fringe burn.

MELONS



Cantaloupe



Honeydew



Watermelon

Availability centers on 9s and 12s, with smaller fruit rebounding. Quality remains strong with brix levels between 12-14%.

Eight-count fruit is scarce; size flexibility is required. Quality is improving, and sugar levels are holding at 12-13%.

Lower Mexican volume is driving the market up. Cooler weather in Guatemala has reduced yields and shifted sizing to larger 36s, while Florida's freeze threatens upcoming early production.



TOMATOES – USA



Round & Roma

Florida's deep freeze has triggered firm markets and shortages. Expect tight supply and interruptions through late March; size and variety substitutions will be necessary.

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

Supply is very short and prices are higher. Growers are currently assessing freeze damage to determine the impact on future production.



TOMATOES – MX



Round	Volume is slowly improving, but heavy East Coast demand is keeping FOB prices high. Quality through McAllen and Nogales is very good.
Roma	Production is increasing, but strong demand is offsetting volume gains and sustaining high prices. Quality remains very good.
Grape	Light supply and increased demand have pushed pricing up, a trend expected to continue due to Florida's weather. Quality is outstanding.
Cherry	Light supply and increased demand have pushed pricing up, a trend expected to continue due to Florida's weather. Quality is outstanding.
Mixed Medley	Light supply and increased demand have pushed pricing up, a trend expected to continue due to Florida's weather. Quality is outstanding.

FRUITS & VEGETABLES



Avocados

Mexico exported over 70 million pounds to the U.S. in week 5 to meet aggressive Super Bowl demand. The crop is maturing well, with dry matter reaching 31% and sizing heavily concentrating on 48 and 60 counts.



Bananas

Tropical output is shrinking due to disease pressure and rising costs, which will tighten availability as global consumption climbs. Quality is currently solid, but navigating the upcoming shortage requires strict adherence to consistent ordering practices.



Pineapple

High demand is keeping the market tight and prices firm, even as conditions stabilize slightly. Flavor profiles are excellent, but buyers must be flexible with size preferences to ensure uninterrupted contract fulfillment.



Table Grapes

Availability has smoothed out across all colors, featuring high-sugar fruit and outstanding condition. Offerings include Sweet Globes and Red Globes, with steady volumes of generic varieties also available for immediate loading.



Green Bell Pepper

Mexico is currently providing the most reliable volume and quality, standing in sharp contrast to the scarcity in South Florida. Following recent widespread freezes, domestic regions are assessing significant crop damage that will likely result in heavy losses and supply gaps in the weeks ahead.



Color Bell Pepper

Cooler temperatures have dampened production volumes, though fruit crossing through McAllen and Nogales continues to meet quality standards.



Eggplant

Florida's output is critically low following the freeze, making Mexican imports the primary source for quality fruit. The industry is bracing for confirmed crop losses in domestic regions, which will severely constrain supply moving forward.



Cucumbers

Slicer: Crossings at Nogales and McAllen have tapered off due to cooler weather, while recent domestic freezes signal impending supply deficits. Relief is expected shortly as Honduras begins shipping within the next two weeks. English: Reduced volume combined with moderate demand is driving pricing upward at key crossings, though quality remains solid.



Green Beans

The market is volatile and priced high following Florida's freeze, which caused extensive damage. Mexico offers limited relief as cool weather there has also slowed production, creating a tight environment with fair quality.

French Beans

Logistics are the primary challenge, with vessel delays causing inconsistent availability for Guatemalan product on the East Coast. Simultaneously, Mexican growers are battling cooler temperatures that are suppressing yields.



**Zucchini/
Yellow Squash**

Pricing is climbing as Florida faces acute shortages and Nogales crossings slow down due to weather. Mexico currently holds the best quality fruit, while domestic growers are calculating significant losses from recent low temperatures.



Fresh Herbs

Colombian basil and rosemary are facing setbacks from heavy rain and customs holds, while Ecuadorian chervil remains limited. Mexican basil is showing inconsistent quality due to winter weather, and arugula and cilantro supplies are critical enough to trigger likely prorates.



Artichokes

Supply and quality are good, though large sizes remain limited.



Asparagus

A gap between Peru's exit and Mexico's weather-delayed start has tightened supply. Expect elevated pricing for 7-10 days until Caborca production normalizes.



Bok Choy

Supply and quality are currently average.



Borccoli/Crowns

Weather has caused significant defects, including browning and pin rot. Supplies are tight; expect strict averages and prorates.



**Broccolini/Sweet
Baby Broccoli**

Weather has severely limited harvest volume despite good quality. Expect strict allocation and prorates.



Brussel Sprouts

Inventory remains limited due to insect pressure and browning, though relief is expected in two weeks. Strict averages remain in effect.



Carrots

Rain and muddy fields are restricting harvests for Baby, Cello, and Jumbo carrots. Prorates are expected for 2-3 weeks; Georgia Jumbos are available as an alternative.



Cauliflower

Supplies have tightened significantly; quality is average.



Celery

Weather damage is restricting supply and affecting quality. Value-added packs face prorates through mid-February, and cartons are on strict allocation.



Corn

Florida's market is high due to freeze damage, while Mexico maintains good quality. Domestic supply gaps are expected.



Fennel

Low yields have caused a shortage and price increases. Expect strict averages or prorates.

FRUITS & VEGETABLES



Kale

Weather is limiting supply; quality is average.



Leeks

Supply and quality are holding steady.



Garlic

Supply is tight; quality is good.



Ginger

Market is steady.



Green Cabbage

Supply and quality are good.



Green Onions

Weather and past rain have severely impacted yields. Supplies are critical, with strict averages and prorates expected through mid-February.



Mushrooms

High holiday demand is outstripping the currently light supply. Quality remains good.



Napa Cabbage

The market is rising as supplies tighten; quality is good.



Parsley

Inventory and quality are stable.



Red Cabbage

Availability is light; quality is good.



Spinach

Mildew and disease have significantly reduced yields. Quality is suffering from weak texture, discoloration, and wilting.



**Snow Peas &
Sugar Snaps**

Rain in Mexico and freezes in Guatemala have cut production. Supplies will stay tight for 2-3 weeks until Baja ramps up.



Onions

The market is stable with reliable storage supply from the Northwest. Pricing and availability remain favorable.



Potatoes

Storage stocks are sufficient to support strong availability and sizing. The market is expected to remain soft through spring.