



## OVERVIEW:

Mexican imports are providing relief for cucumbers and squash, though Florida remains depleted of cucumbers while its squash volume recovers. However, Florida continues to face severe shortages in tomatoes, beans, bell peppers, and corn. Hot peppers are extremely scarce across all varieties. In Yuma, persistent weather issues including mildew and pests are reducing lettuce yields and shelf life. Similar constraints affect carrots, celery, and green onions following storm damage, with green onions and broccolini reaching critical supply lows. While broccoli and cauliflower have improved momentarily, pest pressure suggests upcoming market instability and an early end to the Yuma season.

Guatemalan production of French beans, peas, and baby carrots has been hampered by recent frosts and port congestion in Central America, further tightening the market. In the citrus and fruit sectors, lime volume from Veracruz is dropping, prompting a shift toward Colombian sourcing. Conversely, avocado and strawberry volumes are rising, particularly for larger fruit, though blueberries and raspberries remain in short supply. Banana availability is tightening due to global demand and viral impacts, while melon trends are mixed; cantaloupe is steady, but honeydew is declining because of disease.

Tree fruit supplies currently favor larger specifications. Lemons and navel oranges are peaking on larger sizes, making smaller counts difficult to secure. While grapefruit and mandarin varieties remain available, buyers should anticipate size-specific gaps. Overarching these logistical challenges, ongoing civil unrest in Mexico is expected to disrupt labor and transportation, likely reducing total output for the next month. To mitigate these risks, prioritize larger fruit sizes and maintain constant contact with suppliers.

## ALERT LIST:

### ESCALATED

Anise, Asparagus, Bok Choy, Broccoli/Crowns, Cauliflower, Celery/Celery Sleeved, Cilantro, Fennel, French Beans, Honeydews, Hot Pepper: All Varieties, Leeks, Lettuce, Napa, Parsley Italian, Romaine, Romaine Hearts, Snow Peas & Sugar Snap Peas, Tomatillos, White Asparagus

### EXTREME

Beans (Florida), Bell Pepper (Florida), Blueberries, Broccolini, Corn (Florida), Cucumber (Florida), Eggplant (Florida), Green Beans, Green Onions, Limes, Raspberries, Sweet Corn, Tomatoes (Rounds and Roma)

## WATCH LIST:

Red & Green Cabbage, Red/Green Leaf Lettuce, Herbs, Small Lemons, Pineapple, Ginger, Cantaloupe, Small Citrus

## BERRIES



### Strawberries

California production is unseasonably early across all major districts, creating an ideal window for spring promotions through Easter. Quality is characterized by large, high-shen fruit. Florida and Baja remain steady, while Central Mexico is beginning its seasonal transition out of the market.



### Blackberries

Volume from Central Mexico has dipped as the region passes its peak, leading to tighter short-term availability. Expect supplies to rebound and stabilize by early April; fruit quality remains consistent despite the lower volume.



### Raspberries

Expect significant shortages, pro-rates, and potential cancellations through April. Low yields in Central Mexico, pruning cycles, and regional unrest are severely limiting output. Relief is not anticipated until late April when Baja production begins to supplement the market.



### Blueberries

Availability is critical as Mexican and South American seasons wind down. The situation is further complicated by severe crop losses in Florida—estimated at 80% or more for many growers—following earlier freeze events. Expect very limited volume for the next several weeks.

## CITRUS



Limes

Supplies from Mexico have dropped sharply following adverse January weather. Current harvests are skewed heavily toward smaller fruit, though sizing should improve within the next month. Quality remains fair, with some disease affecting shelf life; buyers may need to pivot to Colombian sourcing through March to maintain inventory.



CA & TX Citrus

- **Lemons (CA):** Inventory is robust across all growing districts. The crop is currently leaning toward fancy grade, with peak availability in 140s and larger. While 165/200 counts are slightly tighter, overall supply remains healthy.
- **Navels (CA):** The manifest is currently peaking on 72/88 counts, creating a significant shortage of 113/138 sizes. This scarcity is putting pressure on 88-count stocks, so buyers should be prepared to substitute with 72s or larger. Primary volume is originating from the Central Valley.
- **Cara-Cara Navels (CA):** Mirroring the Navel market, fruit is trending larger with a peak on 72/88 counts. Smaller sizes (113/138) are extremely limited, though overall quality and larger-size availability remain steady.
- **Mandarins (CA):** Availability is inconsistent across the industry, with some shippers reporting shortages while others remain stable. Frequent communication with specific suppliers is recommended to confirm real-time inventory levels.
- **Minneolas & Blood Oranges (CA):** Large fruit is plentiful for both varieties, offering potential for promotional volume. However, small-count Minneolas are currently tight.
- **Grapefruit (CA / Rio Red):** California Rio Reds are currently shipping.
- **Navels & Valencias (TX):** Supply is limited and peaking on 72s. Expect this program to continue through the end of April.
- **Grapefruit (TX / Rio Red):** Grapefruit is peaking on 36/40 counts, with supplies expected to remain available through April.

## WEST COAST LETTUCE



Iceberg & VA

While volume remains steady, overall quality is inconsistent due to intense insect pressure and mildew. Expect lighter carton weights and diminished shelf life as weather continues to impact harvestable yields. Value-added (VA) packs are also showing signs of mildew and reduced durability within the bags.

Romaine,  
Hearts & VA

Supplies are currently meeting averages, but quality issues like fringe burn, bruising, and outer-leaf mildew are prevalent. Romaine Hearts have officially hit EXTREME triggers as the industry approaches the seasonal transition, with inventory expected to tighten significantly in the coming weeks. VA: Finished product quality is currently fair, though processors are reporting higher core content and occasional mildew within the packaging.

Boston & Butter  
Lettuce

Availability and general quality are holding steady for now. However, growers are monitoring persistent pressure from fringe burn and mildew across most fields.

Better Burger,  
Green & Red Leaf

Supply levels are currently adequate, but weights remain light across the board. Similar to other leaf varieties, mildew and fringe burn continue to affect the aesthetic and structural integrity of the crop.

## MELONS



Cantaloupe

Inventory shows a healthy mix of 9s and 12s. Overall quality is solid, and sugar content is performing well between 12% and 14% brix.



Honeydew

Downy Mildew in Guatemala and Honduras is aggressively impacting yields and fruit size. These issues are expected to persist for at least a month.



Watermelon

The seedless market remains steady despite fewer Mexican crossings. Cooler Guatemalan weather has slowed production and shifted sizing toward larger 36-counts.

## FRUITS & VEGETABLES



**Avocados**

Mexico remains the primary supply driver, harvesting 89.5 million pounds recently with the bulk diverted to U.S. markets. Current sizing favors 40s through 60s, and dry matter has reached 33%, though some rain-related lenticel is visible. California's season is starting slowly with lower dry matter and minimal volume.



**Bananas**

Inventories are tightening due to a combination of high global demand, viral pressure in tropical regions, and rising operational costs. While current quality is strong, consistent ordering and proactive planning are necessary to navigate expected yield fluctuations over the coming year.



**Pineapple**

The market is stabilizing but remains constrained. High demand is keeping prices firm, and while contract fulfillment is steady, buyers should remain flexible on sizing to ensure consistent arrivals. Fruit quality and flavor profiles are currently high.



**Table Grapes**

Supply has found a steady rhythm across all three colors with excellent brix levels. Current availability includes Sweet Globes for green varieties, while red options feature Red Globes and Sweet Flavor alongside various generic labels.



**Green Bell Pepper**

Inventory is critically low as Mexican yields suffer from pest pressure and Florida faces near-total losses following recent freezes. Anticipate extreme volatility and elevated pricing through mid-April.



**Color Bell Pepper**

Cooler temperatures in Mexico and freeze damage in Florida have significantly reduced volumes. While the hot house category may offer minor relief in the coming weeks, the market will remain unstable through April.



**Mini Sweet Pepper**

Unlike the larger varieties, mini sweets are holding steady with stable volumes and consistent quality expected for the foreseeable future.



**Mixed Chili Pepper**

Chili varieties including Jalapeno, Serrano, and Habanero are tightening this week despite decent production in Sinaloa.



**Tomatillo**

Tomatillo supply is showing signs of recovery, though high demand shifting toward Mexico is keeping the market firm.



**Eggplant**

Domestic production in Florida is virtually non-existent due to freeze damage. While crossings through Nogales remain the primary supply source, overall availability is very thin, with the best quality currently originating from Mexico.



**Cucumbers**

New harvest blocks in Mexico are starting to provide relief for slicers, but the market remains split and expensive due to Florida's crop failure. English cucumbers are also seeing higher price points as supply lightens against moderate demand.



**Green Beans**

The industry is facing severe shortages, with "Act of God" declarations being issued following the Florida freeze. Mexico is unable to fill the gap due to cold weather slowing production. Expect extreme volatility and fair quality at best through early April.

**French Beans**

A combination of frost in Guatemala and cool temperatures in Mexico has left the market extremely limited. Supplies are expected to remain tight until temperatures rise in key growing regions.



**Zucchini/  
Yellow Squash**

Green squash availability is beginning to improve as new blocks open in Mexico and Florida. Yellow squash remains slightly behind in volume, but overall price relief is anticipated within the next week.



**Fresh Herbs**

Basil remains inconsistent due to Mexican cold snaps, Colombian rain, and USDA inspection delays. Arugula and Cilantro are currently extremely limited, with prorates likely. While most other herbs are steady, tarragon remains a difficult fill.



**Artichokes**

Both inventory levels and product quality remain in good standing.



**Asparagus**

Mexican yields have improved, though upcoming heat may cause some tip feathering. Peruvian imports are still roughly a month away.



**Bok Choy**

Supplies and quality are currently meeting basic requirements, though the market remains unsettled.



**Borccoli/Crowns**

Rain and warmth in Yuma have triggered issues like pin rot and browning. Supplies have contracted, forcing growers to adhere to strict averages.



**Broccoli/Sweet  
Baby Broccoli**

Volume is critically low due to adverse harvesting conditions. Most growers are struggling to meet demand.



**Brussel Sprouts**

This category is no longer escalated. While some internal browning remains, both volume and quality are on an upward trend.



**Carrots**

Saturated fields have made harvesting extremely difficult. Between muddy conditions and seasonal declines in Mexican volume, prorates are expected.



**Cauliflower**

Quality is good, but supplies are tightening. The market remains at extreme levels.



**Celery**

Availability is gradually improving, but weather-related harvesting gaps remain. Full market recovery is not anticipated until April.



**Corn**

Florida has lost approximately 80% of its current cycle to freeze damage. Expect volatile markets and poor quality—specifically small ears—through April.



**Fennel**

Poor field yields have created a shortage, with many growers implementing prorates based on 8-week purchase averages.

## FRUITS & VEGETABLES



**Kale**

Supplies are currently restricted and quality is only fair as weather continues to hamper field operations.



**Leeks**

Product quality is stable, but total availability remains below seasonal norms.



**Garlic**

Quality is high, though the current crop is starting to show snug supply levels.



**Ginger**

Both pricing and inventory levels remain steady.



**Green Cabbage**

Quality is good, but the market is beginning to tighten as we move into March.



**Green Onions**

Persistent rain in Mexico is severely limiting yields. Supplies will remain extremely challenged as the industry approaches transition.



**Mushrooms**

Supply and quality are expected to remain consistent and reliable for the next several weeks.



**Napa Cabbage**

Quality is holding, but the market is climbing as supplies become increasingly tight.



**Parsley**

Both varieties currently show good quality and adequate supply levels.



**Red Cabbage**

Quality is currently high, but overall volume is light.



**Spinach**

Inventory remains constrained. Shipments continue to show signs of wilting, discoloration, and weak texture. Furthermore, emerging disease and mildew pressure are significantly reducing harvestable yields.



**Snow Peas &  
Sugar Snaps**

Guatemalan production is healthy for snow peas and improving for sugar snaps. Conversely, Mexican volume remains fair at best as growers manage seasonal field transitions, leading to inconsistent supply.



**Onions**

The market remains firm and stable. Since the harvest is finished, all supply is currently shipping from Pacific Northwest storage. Pricing and availability are expected to remain buyer-friendly through the quarter, with no major fluctuations anticipated.



**Potatoes**

Supplies for the rest of the year are fully supported by storage shipments, with robust sizing available across all categories. The market is expected to remain relatively soft until late spring, when a seasonal tightening of supply typically drives pricing higher.



## TOMATOES - USA



### **Round & Roma**

Florida is entering its period of lightest production for the entire season. Markets will stay volatile through early May due to unprecedented weather. Expect "Act of God" declarations from Florida partners and the necessity to substitute sizes and varieties to maintain supply.

### **Grape, Medley, Cherry**

Inventory was exceptionally low this week for grape, cherry, and medley varieties. While cherry and medley pricing rose, grape tomatoes remained slightly more stable as additional volume hit the market.



## TOMATOES - MX



### **Round**

Supplies are expected to increase gradually as Sonora begins its harvest. Despite the added volume, market prices remain strong. Fruit quality entering through Nogales and McAllen is currently very high.

### **Roma**

The market is seeing significant fluctuations in both cost and quality as production overlaps between older fields in Sinaloa and new blocks in Sonora. Demand shifting away from Florida is keeping the market volatile.

### **Grape, Cherry, Medley**

Supply is trending upward while demand has softened, leading to lower price points this week. Quality for grape, medley, and cherry varieties is reported as outstanding.