



**OVERVIEW:**

**Severe weather and freezing temperatures across Florida and Mexico have triggered official "Act of God" declarations, significantly tightening supplies for tomatoes, cucumbers, squash, beans, peppers, and corn. High demand and rapid inventory turnover are currently preventing the natural ripening process in tomatoes, necessitating warmer transport temperatures, the use of pallet wraps, and heated storage at both the warehouse and store levels to effectively manage color.**

Citrus availability is heavily skewed toward larger sizes; while lemon and mandarin volumes remain steady, a critical shortage of 113/138 navels is forcing widespread substitutions to 72s. While avocados and limes have stabilized with a surplus of jumbo fruit, banana supplies are expected to tighten further due to strong global demand and localized viral issues. Cantaloupe volume is currently rising, yet honeydew yields are declining sharply due to downy mildew impacting fields across Central America.

In the Yuma region, persistent heat has introduced widespread mildew and insect pressure, shortening the shelf life of lettuce and leafy greens, with broccoli, cauliflower, and broccolini facing supply cuts as high as 50% through mid-March. Frost and ongoing port congestion in Guatemala further restrict the flow of peas and baby carrots to the market. Nationally, freight capacity has decreased by 10% due to stricter regulatory enforcement, keeping rates high and volatile as carriers frequently prioritize more profitable industries over fresh produce shipments.

**ALERT LIST:**

**ESCALATED**

Anise, Asparagus (White), Bok Choy, Broccoli, Broccoli Florets, Cilantro, Fennel, French Beans, Honeydews, Hot Pepper (Red Fresno, Caribe, and Shishito), Leeks, Lettuce, Lettuce (Cello/Wrapped), Limes, Napa, Parsley (Italian), Romaine, Romaine Hearts, Snow Peas, Strawberries, Sugar Snap Peas, Tomatillos

**EXTREME**

Asparagus, Beans, Blueberries, Broccoli Crowns (Asian Cut/Organic), Broccolini, Cauliflower, Celery, Celery Sleeved, Corn, Cucumber, Eggplant, Green Beans, Green Onions, Peppers (Bell), Squash (Soft), Sweet Corn, Tomatoes (Rounds and Roma from Mexico and Florida)

**WATCH LIST:**

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

**BERRIES**



**Strawberries**

CA yields are climbing following recent freezes and rain, though rising temperatures are revealing water damage in ripe fruit. Crews are currently stripping affected berries and evaluating long-term impacts on blooms and plant structures, prioritizing aggressive sorting for fresh packs. In Central Mexico, production is tapering off as the season concludes; higher daytime temperatures are causing some bruising and overripe fruit, with sizing trending small to medium. Florida volumes have rebounded post-freeze and should remain steady through next week, though potential gaps and uneven sizing may surface as damage to early-stage fruit becomes visible.



**Blackberries**

Supplies from Central Mexico and Baja remain stable with good overall availability. Quality is generally strong, although recent heat and humidity have caused occasional softness and color reversion in some lots.



**Raspberries**

While harvesting continues in Central Mexico and Baja, volume is tightening as the crop moves past its seasonal peak. Expect reduced availability over the next six to eight weeks, though quality remains consistent.



**Blueberries**

Inventories are extremely low as Mexican and South American seasons wind down. While Mexican fruit shows good size and quality, overall market availability will remain restricted for several weeks. Florida reports indicate a massive 80–85% crop loss due to freeze events, which will significantly tighten the spring market and delay any meaningful production through March.

## CITRUS



Limes

Cooler weather and January rainfall across Mexico, Colombia, and Peru have resulted in much lighter supplies this week. The current profile is heavy toward smaller fruit, though recent rains in Southern Mexico are beginning to push larger sizes into the new crop. Quality is currently fair, with some disease affecting shelf life and appearance. Expect price and size volatility to persist through March.



CA & TX Citrus

- **Lemons (CA):** Volume is steady across the Central Valley, Ventura, Coachella, and Yuma. Supply is currently peaking on 140s and larger, primarily in fancy grade, while 165/200 counts remain limited. Meyer lemons are also available for loading in D1.
- **Navels (CA):** The harvest is heavy on 72/88s with very few 113/138s available. This shortage is straining 88-count inventories, so expect 72s as the primary substitution.
- **Cara-Cara Navels (CA):** Sizing peaks on 72/88s. Similar to standard navels, smaller fruit is scarce; shifting to larger sizes is advised for consistent loading in the Central Valley.
- **Mandarins (CA):** California production has resumed, with current volume peaking on larger 12, 15, and 18-count fruit.
- **Minneolas & Blood Oranges (CA):** Both are available and peaking on larger sizes. Small Minneolas are tight, necessitating a move to larger fruit to meet volume needs.
- **Pummelos (CA):** Strong volume is available in 6/8/10 counts, offered in bulk bins.
- **Grapefruit (CA / Rio Red):** Rubies have entered the market, though 36/40 counts are currently in short supply.
- **Navels & Valencias (TX):** Valencias are now loading, peaking on 72/88s. Supply is expected to continue through April.
- **Grapefruit (TX / Rio Red):** Inventory is peaking on 48/36s, though larger fruit is becoming snug. Texas serves as a viable alternative for grapefruit through April should California supplies tighten.

## WEST COAST LETTUCE



Iceberg & VA

Supply and quality are marginal, with light weights across the board. Market activity is high as insect pressure, mildew, and cap leaf damage reduce yields. Expect inconsistent quality and significantly shortened shelf life. For value-added (VA) packs, quality remains mediocre with reports of mildew and insects inside bags.

Romaine,  
Hearts & VA

Supplies are tightening, with hearts now reaching the EXTREME trigger. Current lots show bruising, fringe burn, and outer-leaf mildew. Most growers are limiting orders to historical averages as availability is expected to drop further through March. VA Romaine is showing increased core material and mildew presence.

Boston & Butter  
Lettuce

Volume and quality are currently stable. However, fields are under pressure from fringe burn and mildew, which may impact future harvests.

Better Burger,  
Green & Red Leaf

Current availability is sufficient, though weights remain light. Mildew and fringe burn persist as the primary quality concerns for these categories.

## MELONS



Cantaloupe

Supply is balanced between 9s and 12s, with 15-count volume increasing. Quality is steady with sugar levels at 12-14% Brix.



Honeydew

Downy Mildew in Guatemala and Honduras is sharply reducing yields and fruit size. Expect a shortage of larger melons and low sugar levels for at least 30 days; size flexibility is required.



Watermelon

Seedless pricing is stable despite lower Mexican crossings. Cold weather in Guatemala has cut production and shifted sizing toward 36s. Florida's recent freeze will likely delay or disrupt the early harvest slated for late February.

## FRUITS & VEGETABLES



**Avocados**

Mexico's week 8 harvest reached 64.2 million pounds, with 63.3 million pounds exported to the U.S. Current sizing favors 40s–60s counts. Dry matter has increased to 32%, and while availability is high, some fruit shows minor lenticel spotting due to seasonal rainfall.



**Bananas**

Expect inventories to tighten as global demand rises and tropical yields drop. Viral pressure and elevated production costs are straining the market. While current quality is high and supply is sufficient, maintaining consistent ordering patterns is necessary to mitigate upcoming volume declines.



**Pineapple**

The market is stabilizing but remains constrained by high demand. Pricing is steady and contract volumes are being honored, though size flexibility is required to maintain a consistent supply chain. Flavor and overall quality remain strong.



**Table Grapes**

Availability is stable across all colors with exceptional fruit quality. Brix levels are currently reaching the high teens. Available varieties include Sweet Globe (green), Red Globe and Sweet Flavor (red), along with several generic options across the category.



**Green Bell Pepper**

Inventory is critically low as Mexico faces weather-related disruptions and insect pressure, while Florida production remains devastated by freeze losses. Expect significant price volatility and mixed quality through mid-April.



**Color Bell Pepper**

Yields remain suppressed in Mexico due to cool weather and insects, with Florida supplies nearly non-existent following last month's freeze. While market volatility will likely persist through April, the upcoming Hot House production cycle may provide some volume relief in the near term.



**Mini Sweet Pepper**

Availability and quality are currently stable and expected to remain consistent over the next several weeks.



**Mixed Chili Pepper**

While Sinaloa and Sonora maintain steady overall production, stocks for Caribe, Fresno, and Shishito peppers have tightened this week. Furthermore, expect a sharp drop in Anaheim and Poblano availability as demand spikes for the Lenten season.



**Tomatillo**

Inventory is beginning to recover, with steady improvements in volume and quality expected over the coming week. Pricing remains firm as East Coast buyers shift sourcing to Mexico following Florida's freeze losses.



**Eggplant**

Domestic yields in Florida are nearly non-existent due to freeze damage. Crossing volumes through Nogales remain the primary supply source and currently offer the best available quality.



**Cucumbers**

- **Slicer:** Crossings at Nogales and McAllen are declining as the peak season concludes. Florida remains in a shortage, forcing East Coast markets to source from Honduras and the Dominican Republic. Expect mixed quality and market volatility through April.
- **English:** Reduced supply paired with moderate demand has driven prices higher this week. Despite the lighter volume at the borders, quality remains strong.
- **Persian:** Volume dropped and ripening slowed last week due to cold, rainy conditions in Baja, leading to higher prices. As weather conditions improve, both supply consistency and fruit quality are expected to stabilize.



**Green Beans**

Florida production is critically low following recent freezes, leading to "Act of God" declarations and daily price increases. Quality is only fair, and with cold weather slowing Mexican production, relief is not expected until early April.

**French Beans**

Supplies are severely restricted due to frost in Guatemala and sustained cool temperatures in Mexico. Yields are expected to remain constrained until weather conditions improve in both regions.



**Zucchini/  
Yellow Squash**

A combination of Florida's freeze and lighter crossings through Nogales/McAllen has significantly depleted stocks. Mexico is the primary source for quality fruit, but market instability will persist through March.



**Fresh Herbs**

Basil quality is inconsistent due to Mexico's cold, Colombia's rain, and USDA fumigation delays. While chervil has improved and most herbs are steady, tarragon remains scarce. Arugula and Cilantro are facing extreme shortages, and buyers should anticipate supplier prorates.



**Artichokes**

Inventory levels and quality are both currently stable.



**Asparagus**

Mexican yields are low due to cold weather in San Luis and Caborca, while Peruvian production is in a seasonal decline. Expect supplies to remain critically tight for the next two weeks.



**Bok Choy**

Current volume and quality are maintaining marginal levels.



**Borccoli/Crowns**

Supply has tightened significantly due to heat and rain in Yuma, which triggered browning and pin rot. Many growers are currently prorating orders by up to 50%.



**Broccoli/Sweet  
Baby Broccoli**

Harvesting is severely restricted by recent weather, leaving supplies at critical lows. Despite decent quality, most suppliers are enforcing strict 50% prorates against historical averages.



**Brussel Sprouts**

Market conditions have stabilized and are no longer escalated. Quality and volume are improving as production moves to new regions, though minor insect pressure and internal browning persist.



**Carrots**

Muddy fields from persistent rain have stalled the harvest for most varieties, excluding Rainbow carrots which remain steady. Mexican volume is also seasonally low. Expect limited availability and prorates; buyers should order 7-10 days in advance.



**Cauliflower**

The market remains at an extreme level with very limited availability and only fair quality.



**Celery**

Weather-driven harvest delays have caused a major supply shortage. Growers are limiting all carton and value-added orders to strict averages, with no significant relief expected until April.



**Corn**

Florida has lost 80% of its current cycle to freezes, leading to "Act of God" declarations. Combined with light Mexican production, prices are at historic highs. Quality is poor, immature kernels & small ears.



**Fennel**

Shortages persist due to low field yields. Expect elevated pricing and potential prorates as growers limit orders to 8-week averages.

## FRUITS & VEGETABLES



**Kale**

Harvesting disruptions have limited current availability, and quality is currently mediocre.



**Leeks**

Supply and quality are currently maintaining marginal status.



**Garlic**

Quality is strong, though the current crop is snug. Consistent, steady purchasing is advised to maintain inventory.



**Ginger**

Both market pricing and supplies remain stable.



**Green Cabbage**

While currently steady, this has been added to the watchlist as a significant supply tightening is projected for March.



**Green Onions**

Previous rains in Mexico continue to hamper yields and quality. Supplies are critically short as the region nears transition, and strict prorate are in effect industry-wide.



**Mushrooms**

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



**Napa Cabbage**

Inventory is currently low and the market is trending upward, though quality remains high.



**Parsley**

Availability and quality are both currently steady for both varieties.



**Red Cabbage**

Supplies are currently limited, though the product shows good quality. This has been placed on the watchlist due to tightening inventory.



**Spinach**

Volume remains restricted. Fields are struggling with disease and mildew, leading to reports of weak texture, wilting, and discoloration.



**Snow Peas &  
Sugar Snaps**

Guatemalan yields for both varieties have improved, showing good availability. However, Mexican volumes remain constrained as producers navigate regional field transitions.



**Onions**

The market is stable as the industry shifts exclusively to Pacific Northwest storage stocks. No major price or supply shifts are expected through the end of the quarter, with quality and availability currently favoring buyers.



**Potatoes**

Supply will be fully sustained by storage shipments for the rest of the year. Sizing and availability are strong across all categories, with the market expected to remain soft until the typical spring tightening.



## TOMATOES - USA



- Round** Expect extreme market volatility and inconsistent supply through early May as Florida growers attempt to salvage remaining crops. "Act of God" declarations are in effect, and size substitutions will be necessary to navigate the shortage.
- Roma** Supplies remain critical following the freeze. Market availability will be hit-or-miss over the coming weeks, requiring flexibility with varieties to maintain inventory levels.
- Grape** While slightly more stable than other snacking varieties this week due to a minor increase in market volume, the category remains under significant pressure with high prices.
- Medley** Availability was very short this week. Extreme pricing and limited stocks are expected to persist as demand outpaces current salvagable yields.
- Cherry** Supply is critically low with sharply higher pricing. Expect continued instability as East Coast production struggles to recover from recent weather events.



## TOMATOES - MX



- Round** Volume is gradually increasing through McAllen and Nogales, but heavy demand from the East Coast is keeping FOB prices at record highs. Quality remains very strong despite the market pressure.
- Roma** Late-season blight and reduced acreage in Sinaloa have cut projections by over 30%. High demand from the East is pushing markets toward record levels; expect fair quality and high volatility for the next four to six weeks.
- Grape** Pricing is trending upward due to lighter volume and increased demand from the East. Despite the tighter supply, fruit quality crossing the border remains outstanding.
- Cherry** Market costs are rising as cold weather in Florida forces buyers to source more heavily from Mexico. Quality is currently reported as outstanding.
- Medley** Lighter crossings and shifting demand have driven prices up. This trend is expected to continue through the week, though overall quality is excellent.