



OVERVIEW:

In the West, triple-digit temperatures in Yuma, Salinas, and Huron are driving up insect pressure and threatening crop quality. While lettuce, broccoli, and cauliflower show better volume this week, the heat may cause early season exits and market instability. Carrots, celery, and green onions remain in a prolonged shortage with full recovery not expected until late spring. Regional shifts show Mexico providing some relief for cucumbers and squash, but tomatoes remain tight. Conversely, Florida continues to struggle with severe shortages in tomatoes, peppers, corn, and beans, though squash availability is starting to improve.

The citrus market is dominated by large fruit, leaving a significant gap in small-sized lemons and oranges. California Valencias are expected to begin in late April, while mandarin availability remains inconsistent. For avocados, the market is well-supplied with large fruit from Mexico, but small sizes are scarce. The grape market is split, with steady supplies of reds but tightening numbers for greens. In the melon category, cantaloupe remains strong and honeydew is seeing some relief as growers move into new fields.

Strawberry production is declining as heatwaves impact California and the season winds down in Florida and Central Mexico. Blueberries and raspberries remain on limited prorates, though Georgia's upcoming season should offer blueberry relief by late April. In the import sector, lime supplies are extremely low due to volume drops in Veracruz, prompting efforts to source from Colombia. Additionally, frost and port congestion in Guatemala and Honduras continue to restrict supplies of French beans, peas, and baby carrots. Finally, banana availability is expected to tighten further due to global demand and ongoing virus-related crop issues.

ALERT LIST:

ESCALATED

Asparagus, Bok Choy, Cauliflower, Celery/Celery Sleeved, Fennel/Anise, French Beans, Green Onions, Honeydews, Hot Pepper (All Varieties), Leeks, Lettuce, Napa, Parsley Italian, Romaine, Romaine Hearts, Strawberries, Tomatillos, White Asparagus

EXTREME

Blueberries, Broccoli, Carrots, Green Beans, Limes, Raspberries, Sweet Corn, Tomatoes (Rounds and Roma – Mexico/Florida), Warm Veg Category Florida (Corn, Beans, Cucumber, Bell Pepper, Eggplant)

WATCH LIST:

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

BERRIES



Strawberries

Volume is declining and will remain low as a heatwave impacts all primary California growing regions. While earlier favorable conditions accelerated the season with strong quality, the current heat is causing sun scald, larger fruit sizes, and rapid breakdown. Baja production is steady with reliable quality, and Florida remains stable as its season winds down. Central Mexico is finishing its significant U.S. export cycle, with Texas crossings expected to end this weekend.



Blackberries

Central Mexico continues production, though supplies have tightened following the seasonal peak. Anticipate a volume increase through mid-March, with inventory stabilizing by April. Overall fruit quality remains high.



Raspberries

Availability will remain critically low through March and most of April. Expect pro-rates, potential cancellations, and substitutions across labels or pack styles. Central Mexico has reached its lowest output as fields are pruned for the next cycle. Furthermore, ongoing political unrest and regional blockades in Mexico continue to disrupt operations. Recovery is not expected until late April or early May, with some Baja volume arriving in early April to supplement. Quality remains good despite the shortage.



Blueberries

Supplies are very tight as Central Mexican crops move past their peak and South American imports decline. While Mexican fruit quality and size are performing well, total availability is limited. Florida's early crop is severely impacted by prior freeze events, with many growers reporting losses between 50% and 85%.

CITRUS



Limes

Mexico's supply is critically light following adverse weather in January, resulting in a size profile heavily skewed toward smaller fruit. Quality is currently fair, with some disease affecting shelf life and appearance. Expect pricing and sizing volatility through March; sourcing may shift to Colombia to maintain order fulfillment. Improvements are anticipated in 3 to 4 weeks.



CA & TX Citrus

- **Lemons:** Inventory is trending toward fancy grade, peaking on 140s. Sizes 165 and 200 are tightening, leading some suppliers to restrict new volume on smaller fruit. Conversely, domestic Meyer lemons are currently available and in good supply.
- **Navels:** Mexico's supply is critically light following adverse weather in January, resulting in a size profile heavily skewed toward smaller fruit. Quality is currently fair, with some disease affecting shelf life and appearance. Expect pricing and sizing volatility through March; sourcing may shift to Colombia to maintain order fulfillment. Improvements are anticipated in 3 to 4 weeks.
- **Valencias:** Texas Valencias are currently available through limited suppliers. The California Valencia season is slated to begin in mid-to-late April.
- **Mandarins:** Availability is inconsistent across the market, with some suppliers reporting limited stock while others remain well-supplied.
- **Specialty Citrus (Cara Caras, Minneolas, Blood Oranges):** These varieties continue to peak large, with ongoing shortages of smaller-sized fruit.
- **Grapefruit:** California Star Rubies have entered the market. Texas grapefruit remains available and is expected to last through April.

WEST COAST LETTUCE



Iceberg & VA

- While current volume is stable, head weights are trending light. High insect pressure, mildew, and damaged cap leaves are reducing yields and creating inconsistent quality. Expect shortened shelf life as adverse weather continues to impact harvest conditions.
- **VA:** Supply levels are adequate, but quality reports indicate significant challenges. Issues include presence of mildew, insect pressure within bags, and limited shelf life.

Romaine,
Hearts & VA

- Current availability is meeting averages, but the market is expected to tighten as the season transition approaches. Quality issues include bruising, fringe burn, light weights, and mildew on outer leaves.
- **VA:** Inventory remains stable, though processed bags are showing increased core material and occasional mildew.

Boston & Butter
Lettuce

Supply and quality are currently rated as good. However, growers are monitoring active pressure from mildew and fringe burn.

Better Burger,
Green & Red Leaf

Availability is sufficient for now, though carton weights remain light. Persistent mildew and fringe burn continue to affect overall quality across these varieties.

MELONS



Cantaloupe

Inventory shows a healthy mix of 9s and 12s, with 15s becoming more available. Overall quality remains high, with brix levels averaging 12–14%.



Honeydew

Downy Mildew in Guatemala and Honduras is severely impacting yields, sizing, and sugar content. While some suppliers are accessing new fields early to provide market relief and more uniform sizing, the category remains under pressure.



Watermelon

Import seasons are concluding just as the Florida season sits a month away. This gap is placing heavy demand on Mexican supply, which is keeping pricing firm.

FRUITS & VEGETABLES



Avocados

Mexico recently harvested 87.3 million pounds, shipping 74.3 million to the U.S. Fruit size is currently peaking at 40s–60s with dry matter reaching 34%. While availability is high, expect a harvest slowdown as Holy Week approaches. Meanwhile, California production remains minimal at 2.9 million pounds with lower dry matter around 26%.



Bananas

The market remains under pressure from high global demand, virus-related crop issues, and rising production costs. While current quality is strong and inventories are adequate, supply is expected to tighten. Maintaining consistent ordering patterns is recommended to mitigate potential long-term instability.



Pineapple

Supply remains restricted despite the market stabilizing slightly. Strong demand is keeping prices firm. While contract obligations are being met, size flexibility is necessary to maintain steady flow. Overall eating quality and flavor profiles remain positive.



Table Grapes

Red and black varieties show excellent quality, large sizing, and high sugar content. Conversely, green grape availability is declining, with some lots showing ambering. Current green varieties include Thompson, Sweet Globe, Ivory, and Autumn Crisp; reds include Alison, Red Globe, and Sweet Flavor. Generic options are also available across all colors.



Green Bell Pepper

Supplies are critically low due to freeze losses in South Florida and light crossings from Mexico. Weather and insect pressure in Mexico are causing inconsistent quality. Expect high prices and market volatility to persist through mid-April.



Color Bell Pepper

Cooler weather and pests are reducing Mexican yields, while Florida remains in a severe shortage following last month's freeze. Markets will remain volatile through April, though upcoming Hot House cycles may provide some relief in the following weeks.



Mini Sweet Pepper

Inventory is expected to remain stable over the next several weeks with maintained quality.



Mixed Chili Pepper

While Sinaloa and Sonora show decent production, the market is tightening this week across Jalapeño, Serrano, Caribe, Habanero, Fresno, and Shishito varieties.



Tomatillo

Availability began to improve last week and is expected to trend upward over the next seven days. However, prices remain firm as demand shifts toward Mexico following Florida's crop losses.



Eggplant

Domestic volume out of Florida is nearly non-existent due to freeze damage. Strongest availability and superior quality are currently found in Mexican crossings through Nogales.



Cucumbers

- **Slicer:** New blocks in Sinaloa and Sonora are beginning to improve Western crossings. However, prices remain high and the market remains split due to total crop failure in Florida. Volatility is expected through April.
- **English:** English cucumber pricing has climbed due to lighter supply and moderate demand through Nogales and McAllen.



Green Beans

Florida remains in a severe shortage following freeze events, triggering "Act of God" declarations and daily price hikes. Quality is fair at best. Combined with weather-related slowing in Mexico, extreme shortfalls are expected through early April.

French Beans

Supplies from Guatemala are severely restricted by frost and rain. Mexican production is also lagging as cool temperatures continue to suppress yields.



**Zucchini/
Yellow Squash**

Green squash volume is improving as new blocks open in Florida and Mexico. Yellow squash remains light but is expected to see better availability and price relief within the next week.



Fresh Herbs

Basil production continues to struggle due to cold weather in Mexico and heavy rain in Colombia; inventory is further constrained by USDA holds and fumigation mandates. While imported chervil from Ecuador has improved, tarragon availability remains limited.



Artichokes

Both supply and quality are currently rated as good.



Asparagus

Mexican yields in San Luis and Caborca are steady but face quality issues like seeding and feathered tips due to high temperatures. Peruvian production is 2–3 weeks away. Expect prices to climb through Easter due to high demand and rising fuel costs.



Bok Choy

Supply and quality are currently adequate.



Borccoli/Crowns

While quality is generally good, volume remains light for some growers. Ongoing heat in Yuma is raising concerns regarding browning and pin rot.



**Broccoli/Sweet
Baby Broccoli**

Supplies remain critically limited across most growers due to weather-related harvest disruptions. Volume is expected to improve in 2–3 weeks, though growers are currently adhering to strict averages.



Brussel Sprouts

Availability and quality are trending upward. While growers are still managing insect pressure and internal browning, the transition to new growing regions is expected to further stabilize the market.



Carrots

Heavy rains have severely restricted availability for baby, cello, and jumbo sizes, leading to widespread prorates. While rainbow carrots remain steady, overall supply won't recover until late April or early May. Growers require orders 7–10 days in advance.



Cauliflower

Both quality and inventory levels are currently stable.



Celery

Supplies are improving weekly but remain limited as growers adhere to strict averages. Full market relief is not expected until April.



Corn

Florida has lost roughly 80% of its cycle to freeze damage, triggering "Act of God" declarations. Western markets are seeing record-high pricing as a result. Expect small ear sizes and immature kernels through April as growers salvage remaining crops.



Fennel

Low field yields have created a shortage, forcing some growers to limit orders to 8-week averages. Pricing will remain elevated until yields recover.

FRUITS & VEGETABLES



Kale

Harvesting disruptions have limited supplies; quality is currently fair.



Leeks

Quality and inventory are maintaining adequate levels.



Garlic

Quality is strong, but the crop is tightening. Consistent purchasing is recommended to ensure coverage through the year.



Ginger

Both the market and supply levels remain stable.



Green Cabbage

While quality is good, the market is beginning to tighten as we move through March.



Green Onions

Weather-related harvest issues are impacting industry-wide yields. While the market is trending down, full relief isn't expected until the April transition.



Mushrooms

Inventory and quality are expected to remain steady for the next several weeks.



Napa Cabbage

Supplies are tightening and prices are climbing, though quality remains good.



Parsley

Current quality and supply levels are meeting demand.



Red Cabbage

Quality is holding, but inventory is currently light.



Spinach

Supply is limited by weak texture, wilting, and increasing disease/mildew pressure.



**Snow Peas &
Sugar Snaps**

Guatemalan supplies are currently good. Mexican volume remains fair as growers navigate field transitions.



Onions

The market is stable with Pacific Northwest storage moving exclusively. Texas has begun fresh harvests, with California and New Mexico slated for late April. Pricing remains favorable for buyers.



Potatoes

Storage shipments are fully supporting the market with strong sizing across all categories. Expect a soft market until late spring, when tighter supplies traditionally drive prices higher.



TOMATOES - USA



Round & Roma

Florida is entering its lightest production week of the season. Markets will remain volatile through early May due to unprecedented weather, triggering "Act of God" declarations. Expect necessary substitutions across sizes and varieties to maintain supply.

Grape, Medley, Cherry

Cherry and medley varieties saw very short supply and higher pricing this week. Grape tomatoes remained relatively stable as slightly higher volumes hit the market.



TOMATOES - MX



Round

Markets remain strong despite volume gradually improving as Sonora begins production. Quality through McAllen and Nogales is currently very good.

Roma

Significant variance in quality and price persists. Older Sinaloa crops are heavily impacted by blight, while new Sonora production is high quality and commanding a premium. Supply will remain short with daily price volatility for the next several weeks; transitioning to round tomatoes is recommended where possible.

Grape, Cherry, Medley

Lighter overall supply and demand have created upward price pressure this week. However, quality remains outstanding across all snacking categories.