



**OVERVIEW:**

Tomatoes are hitting critical supply levels this week, with severe shortages and quality issues expected to last for the next month. It is recommended to reduce portions or remove them from menus entirely where possible. Napa Cabbage has also escalated to an extreme trigger status with minimal availability. Additionally, the lime market is extremely short due to low volume from Mexico, and this trend is expected to continue for three to four weeks. Sustained high temperatures across Yuma, Salinas, and the Central Valley are causing significant heat stress, leading to quality defects and reduced shelf life for Strawberries and various Wet Veg items.

Vegetables including Cucumbers, Green Beans, Bell Peppers, Corn, and Artichokes are facing limited availability, while Hot Peppers remain very tight across all varieties. Carrots continue to face supply challenges with a full recovery not anticipated until May. In the berry category, Blueberries and Raspberries are currently being prorated, though relief is expected by late April. Citrus markets are struggling with a lack of small-sized fruit as most varieties are trending large. Tropical items like Bananas are tightening due to global demand and virus issues, and Pineapples currently require size flexibility from buyers.

Expect harvest and border delays next week as a result of Holy Week celebrations in Mexico. Similarly, frost events and port congestion in Guatemala and Honduras are tightening supplies for French Beans, Snap Peas, and Snow Peas. On a more positive note, Avocado supply remains strong as California production ramps up to meet increased demand.

**ALERT LIST:**

**ESCALATED**

Artichokes, Asparagus, Bok Choy, Fennel, Anise, French Beans, Honeydews, Hot Pepper (All Varieties), Parsley Italian, Romaine Hearts, Strawberries, Tomatillos, White Asparagus

**EXTREME**

Blueberries, Carrots, Green Beans, Limes, Napa, Raspberries, Sweet Corn, Tomatoes (Rounds and Roma), Warm Veg Category (Florida: Corn, Beans, Cucumber, Bell Pepper, Eggplant)

**WATCH LIST:**

Broccoli/Broccolini, Cabbage (Green), Cabbage (Red), Cantaloupe, Cauliflower, Ginger, Herbs, Lettuce (Iceberg), Lettuce (Red Leaf/Green Leaf), Lettuce (Romaine), Pineapple, Small Citrus (All Varieties)

**BERRIES**



**Strawberries**

California supplies are declining due to a sustained heatwave affecting Santa Maria, Watsonville, and Salinas. Heat stress has caused sunburn, softer fruit, and uneven ripening, leading to production volatility. Expect lighter harvests for the next four to five weeks until temperatures moderate and fields normalize. Support from Central Mexico and Florida has concluded for the season.



**Blackberries**

Central Mexico production has tightened as the crop moves past its seasonal peak. Availability is currently reduced but is expected to stabilize and increase by mid-March through April. Overall quality remains good.



**Raspberries**

Supply remains critical through April with frequent prorates and cancellations expected. Tightness is driven by the seasonal pruning cycle in Central Mexico and regional operational disruptions. Significant recovery is not anticipated until late April or early May, though some volume from Baja may provide minor relief in the interim.



**Blueberries**

Market conditions remain tight despite a recent increase in Mexican production. While Mexico is expected to peak in late April, a short-term volume dip is anticipated before then. Georgia and Florida are preparing to start harvests within two weeks, weather permitting. In California, recent heat has lowered pack-out efficiency and stressed plants, though moderating temperatures should improve quality moving forward.

## CITRUS



Limes

Supply remains critical due to adverse January weather in Mexico. Current harvests are heavy on small fruit with fair quality, showing some disease that impacts shelf life. Expect price volatility and size shortages through April; sourcing may shift to Colombia to maintain fill rates.



CA & TX Citrus

- **Lemons:** Inventories are leaning toward fancy grades and 115-counts. Availability of 140s, 165s, and 200s is tightening, with some suppliers capping new orders on these smaller sizes. Domestic Meyer lemons remain available.
- **Navels:** The current crop is peaking at 72s and 88s, leaving 113s and 138s extremely scarce. High demand for mid-sized fruit is also pressuring 88-count supplies; be prepared for 72-count substitutions. Quality is excellent, though fruit is trending large.
- **Valencias:** Texas Valencias are currently limited, with California production slated for mid-to-late April.
- **Mandarins:** Mandarin availability varies significantly by supplier.
- **Specialty Citrus (Cara Caras, Minneolas, Blood Oranges):** Cara-Caras, Minneolas, and Blood Oranges continue to peak large, with persistent shortages on small sizes.
- **Grapefruit:** California Star Ruby grapefruit is now available, and Texas supplies are expected to last through April.

## WEST COAST LETTUCE



Iceberg & VA

- Supply and quality are currently stable, though head weights are light across the board. The market is active as weather conditions impact both harvesting and overall yield. Growers anticipate lower production due to insect pressure, mildew, and cap leaf damage. Expect inconsistent quality and reduced shelf life.
- **VA:** While supplies are adequate, quality is inconsistent. Reports indicate shortened shelf life, insect pressure, and instances of mildew within the bags.

Romaine,  
Hearts & VA

- Romaine Hearts remain ESCALATED, though whole head Romaine has stabilized. While supplies are currently sufficient, they are expected to tighten as the seasonal transition approaches. Quality issues include bruising, fringe burn, light weights, and mildew on outer leaves.
- **VA:** Availability remains good, but processed bags are showing a higher presence of core and some mildew.

Boston & Butter  
Lettuce

Supply and quality are currently good, though fields are facing pressure from mildew and fringe burn.

Better Burger,  
Green & Red Leaf

Current availability is steady, but persistent mildew and fringe burn continue to impact the crop. Carton weights remain consistently light.

## MELONS



Cantaloupe

Quality remains good with high sugar content (12–14% brix). Sizing is a mix of 9s and 12s, with 15s becoming more common.



Honeydew

Production is recovering as virus pressure eases. Early access to new fields has helped the market, though size flexibility remains necessary.



Watermelon

Prices are rising as import seasons conclude and the market waits for domestic and Mexican production to begin.

## FRUITS & VEGETABLES



**Avocados**

Mexico's Week 12 harvest reached 78.1 million pounds, with 64.5 million exported to the U.S. Fruit is currently peaking at 40–60 counts with high dry matter (34%). California reported a 4.7-million-pound harvest, trending toward smaller sizes. Anticipate rising prices due to heavy retail promotions and reduced harvesting during Holy Week.



**Bananas**

Expect tightening supplies throughout the year driven by high global demand, virus pressure, and lower tropical yields. While current quality is high and volume is adequate, consistent ordering patterns are necessary to manage rising costs and production declines.



**Pineapple**

The market is stabilizing but remains tight due to sustained high demand. Pricing is steady and contracts are being honored, though size flexibility is required to maintain supply chain flow. Quality and flavor profiles remain good.



**Table Grapes**

Red and black varieties show outstanding quality with high sugar content and good sizing. Green grapes are becoming scarce and showing increased ambering. Current varieties include Thompson, Sweet Globe, Ivory, and Autumn Crisp for greens, and Alison, Red Globe, and Sweet Flavor for reds.



**Green Bell Pepper**

Supply is extremely limited this week. Florida is facing severe shortages due to freeze losses, while Mexico is reporting very light volume. Quality remains mixed due to weather and insect pressure. Expect high prices and market volatility through mid-April.



**Color Bell Pepper**

Yields are down in Mexico due to cool weather and insects, and Florida supply remains very short following last month's freeze. Markets will remain volatile through April.



**Mini Sweet Pepper**

Supply and quality are expected to remain stable and good over the next several weeks.



**Mixed Chili Pepper**

While overall supply from Sinaloa and Sonora is good, markets are tightening this week for Jalapeño, Serrano, Caribe, Habanero, Fresno, and Shishito varieties.



**Tomatillo**

Availability is beginning to improve, with further gains expected over the next week. Markets remain firm as demand shifts toward Mexico to offset Florida's freeze losses.



**Eggplant**

Domestic supply from Florida is nearly non-existent following the freeze. Crossings through Nogales remain strong, with the best quality currently coming out of Mexico.



**Cucumbers**

- **Slicer:** Expect a split market with firm pricing through April due to Florida's losses. Supply from Nogales and McAllen is expected to improve after Holy Week.
- **English:** Pricing has trended higher this week due to lighter supply and moderate demand. Crossings through Nogales and McAllen are lower, though quality remains good.



**Green Beans**

Markets are in a state of extreme shortage with "Act of God" declarations issued in Florida. Prices are rising daily, and quality is fair at best. Mexican production is also slowed by cool weather. Expect severe challenges through early April.

**French Beans**

Supply is very limited due to frost and rain in Guatemala and cool temperatures in Mexico. High holiday demand and the shortage of standard green beans are keeping markets elevated.



**Zucchini/  
Yellow Squash**

Green squash supply is steady, while yellow squash remains light. Quality is good for both as new growing blocks begin production in Florida and Mexico.



**Fresh Herbs**

Basil quality and volume continue to be hindered by cold weather in Mexico, rain in Colombia, and strict USDA requirements. While chervil supply has improved from Ecuador, tarragon remains limited.



**Artichokes**

Extreme shortages and heavy mildew pressure are limiting all sizes. Expect these conditions to persist for the next 2–3 weeks.



**Asparagus**

Mexican production is declining seasonally, with high temperatures reducing yields and increasing seeding. Peruvian imports are still 2–3 weeks away. Markets have strengthened due to Easter demand and higher fuel costs.



**Bok Choy**

Quality and supplies are currently adequate but remain on the escalated list due to transition volatility.



**Borccoli/Crowns**

Quality remains good, but several growers are reporting light supplies. Rising temperatures in Yuma are anticipated to cause further supply and quality issues, with ongoing reports of pin rot and browning.



**Broccoli/Sweet  
Baby Broccoli**

Quality is good and availability has improved, though supplies remain light with certain growers who are currently holding to historical averages. The heat in Yuma may impact production and quality during the upcoming transition.



**Brussel Sprouts**

Availability and quality are on the rise as production shifts regions. Despite some lingering insect pressure and internal browning, overall quality is good.



**Carrots**

Expect prorates as Baby, Cello, and Jumbo supplies remain critical. Rainbow carrots are the only steady variety. Relief isn't expected until late April or early May; place orders 7–10 days in advance.



**Cauliflower**

Supply and quality are currently stable.



**Celery**

Inventory and quality remain in good standing.



**Corn**

Markets are hitting historic price highs following an 80% crop loss in Florida. "Act of God" declarations are in effect. Expect immature kernels and small ears through April as growers salvage remaining yields.



**Fennel**

Lower field yields have triggered shortages and prorates. Pricing will remain escalated until supplies improve.

## FRUITS & VEGETABLES



**Kale**

Supplies are tight and quality is only fair. Adverse weather continues to hamper both harvesting and plant health.



**Leeks**

Quality is stable, but the market remains escalated.



**Garlic**

Quality is solid, but inventories are snug. Maintain consistent purchasing to secure volume for the remainder of the year.



**Ginger**

Both pricing and availability are holding steady.



**Green Cabbage**

While currently stable, the market is tightening. Expect a significant drop in availability as we move through March.



**Green Onions**

Volume has improved and quality remains strong.



**Mushrooms**

Expect consistent supply and good quality for the next several weeks.



**Napa Cabbage**

Supplies are extremely limited. Excessive heat is hindering growth and increasing insect pressure.



**Parsley**

Supply and quality remain in good condition.



**Red Cabbage**

Added to the WATCHLIST as markets tighten and supplies lighten heading into March.



**Spinach**

Yields are suffering from disease and mildew. Supplies are limited, with reports of wilting, discoloration, and weak texture.



**Snow Peas &  
Sugar Snaps**

Guatemalan snow pea supply is strong, but sugar snaps are declining. Conversely, Mexican production for both is beginning to stabilize and improve.



**Onions**

The market is stable as Pacific Northwest harvests conclude and shipments transition exclusively to storage. New crop production has launched in Texas, with California and New Mexico expected to begin in late April. Buyers can expect favorable pricing, high quality, and abundant availability for the foreseeable future.



**Potatoes**

Inventory for the rest of the year will be supported by storage supplies, with strong sizing and volume across all varieties. The market is expected to remain soft until late spring, at which point tightening supplies may drive higher pricing, consistent with last year's trends.



## TOMATOES - USA



### Round, Roma & Snacking

Florida is entering its lightest production period of the season, with these conditions expected to persist for at least a month. Expect frequent prorates and shorts. To manage the lack of supply, it will be necessary to substitute sizes and varieties where possible. Overall quality is fair at best.



## TOMATOES - MX



### Round

Heavy disease pressure in Sinaloa and minimal supply out of Sonora will cause volumes to drop over the coming week. Anticipate color issues, prorates, and order cuts for several weeks, with no significant improvement until late April. Quality is inconsistent; older fruit shows heavy imperfections, while newer production is superior.

### Roma

Blight in Sinaloa is causing a dramatic collapse in volume and quality. While newer production in Sonora offers much better quality, it is currently commanding a premium and lacks the volume to offset the deficit. Markets are volatile and subject to daily changes. Flexibility on sizing and a willingness to substitute with rounds is suggested.

### Grape, Cherry, Medley

Supplies are critical due to virus pressure and crops ending prematurely, driving prices higher with very little availability. Quality remains fair at best. Significant improvements are not anticipated until the new crop begins around the end of April.