



## OVERVIEW:

Vegetable markets remain strained as freezing temperatures in Mexico and Florida disrupt production for staples like tomatoes, cucumbers, squash, and peppers. These weather events, combined with transportation shortages and regulatory enforcement, have reduced national freight capacity by roughly 10%. In the Southeast, growers have begun declaring Act of God status on several commodities, while civil unrest in Mexico further threatens labor and logistics for the next month. Supply gaps are also widening in Central America due to port congestion and frost impacting beans and peas.

Specific categories face extreme volatility. Leafy greens and brassicas out of Yuma are battling mildew and insect pressure caused by unseasonable warmth, keeping cauliflower and celery at critical levels. While avocado and strawberry supplies are stabilizing, the berry category overall is seeing significant declines in raspberry and blueberry volume. Citrus availability is currently skewed toward larger fruit, making small sizes scarce across lemons and navels. For tomatoes, high demand is preventing natural ripening at the source, necessitating warmer storage temperatures and pallet wrapping throughout the supply chain to manage color.

Strategic flexibility is required to navigate these shortages. Buyers should prepare for prorates on broccolini and green onions while shifting toward larger sizes in citrus and pineapples where possible. Though cantaloupe and avocado volumes are recovering, expect tightening markets for limes, bananas, and honeydews as seasonal and disease-related issues persist. High freight rates and carrier instability will likely continue, prioritizing shipments only where rates remain competitive against other industries.

## ALERT LIST:

### ESCALATED

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

### EXTREME

Blueberries, Broccolini, Cauliflower, Celery/Celery Sleeved, Green Beans, Green Onions, Raspberries, Sweet Corn, Tomatoes (Rounds and Roma), Warm Veg Category (Bell Pepper, Corn, Beans, Cucumber, Eggplant, Soft Squash)

## WATCH LIST:

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

## BERRIES



### Strawberries

Markets are stabilizing as California and Florida volumes rise, offsetting Mexico's seasonal decline. California fields are drying out, while Florida has recovered from recent freezes (though some bloom damage may cause future gaps). Note that Mexico is seeing some bruising and smaller sizing due to late-season heat.



### Blackberries

Supply is steady out of Central Mexico and Baja. Quality is generally good, though recent humidity and heat have caused minor softness and red cell issues.



### Raspberries

Expect severe shortages and prorates over the next 3-6 weeks. Cartel-related unrest in Mexican growing regions has disrupted field labor, cooling facilities, and logistics, sharply reducing border-bound volume.



### Blueberries

Mexican supplies are critically tight. Like raspberries, regional violence and infrastructure blockades in Mexico are significantly hindering harvest and transportation, leading to anticipated prorates for several weeks.

## CITRUS



Limes

Mexican supplies have tightened significantly following January rains and cold. Current inventory is heavy toward small fruit, with fair quality and some disease impacting shelf life. Expect price volatility and sizing challenges through March, with improvements anticipated in 3–4 weeks.



CA & TX Citrus

- **Lemons (CA):** Availability is strong across all sizes from California and Oxnard. The manifest leans toward fancy grade, peaking on 140s and larger. While 165/200 counts are slightly snug, overall volume remains healthy.
- **Navels (CA):** The crop is trending large, peaking on 72/88 counts. A significant shortage of 113/138 sizes is placing heavy pressure on 88s; be prepared to substitute with 72s. Primary sourcing is coming from the Central Valley, with limited volume out of Fillmore and Riverside.
- **Cara-Cara Navels (CA):** Supply mirrors Navels, with fruit peaking on 72/88 counts and a shortage of smaller 113/138 sizes.
- **Mandarins (CA):** Inventory varies greatly by shipper. Some suppliers report limited stocks while others remain comfortable. We recommend frequent communication with specific vendors to confirm individual allocations.
- **Minneolas & Blood Oranges (CA):** Large sizes are plentiful for blood oranges. Minneolas small sizes tight.
- **Grapefruit (CA / Rio Red):** Supplies are active and currently available.
- **Navels & Valencias (TX):** Peak sizing is on 72s.
- **Grapefruit (TX / Rio Red):** Currently shipping with a focus on 36/40 counts.

## WEST COAST LETTUCE



Iceberg & VA

Market activity is high as weather-related insect pressure, mildew, and cap leaf damage reduce yields. Expect lighter weights, inconsistent quality, and reduced shelf life. VA: Supplies are mediocre; reports indicate mildew and insect presence within bagged product.

Romaine,  
Hearts & VA

Romaine remains escalated with issues including fringe burn, bruising, and mildew. Romaine Hearts have hit the extreme trigger. Expect tightening inventory and strict adherence to averages through March. VA: Mildew and increased core material are being observed in bagged processed items.

Boston & Butter  
Lettuce

Overall availability is good, though growers are managing fringe burn and mildew pressure.

Better Burger,  
Green & Red Leaf

Current supplies are stable, but carton weights remain light. Mildew and fringe burn persist across all leaf varieties.

## MELONS



Cantaloupe

Availability is strong with a good mix of 9s and 12s, and 15s are beginning to increase. Quality is high, with Brix levels consistently reaching 12–14%.



Honeydew

Downy Mildew in Guatemala and Honduras is severely impacting yields, fruit size, and sugar content. Suppliers expect these conditions to persist for at least a month; larger fruit is scarce, and size flexibility is mandatory.



Watermelon

The seedless market remains stable despite fewer Mexican crossings. However, cold weather in Guatemala has caused production to drop and sizes to shift from 45s to 36s. Florida's recent freeze is also expected to delay or reduce early production starting at the end of the month.

## FRUITS & VEGETABLES



**Avocados**

Week 9 harvest reached 65.6 million pounds, with 54.2 million pounds exported to the U.S. Supply is peaking on 40s–60s counts with high dry matter (33%). While availability is strong, expect occasional lenticel spotting due to seasonal rains.



**Bananas**

Supply is tightening as global demand rises and tropical yields drop due to virus pressure and costs. While current quality is high, maintaining strict ordering patterns is essential to offset production inconsistencies over the next year.



**Pineapple**

The market is stabilizing but remains snug under high demand. Contract fulfillment is steady, though flexibility on sizing is necessary to maintain consistent inventory. Quality and flavor profiles remain good.



**Table Grapes**

Availability is stable across all colors with excellent quality and high sugar content. Current varieties include Sweet Globes (Green), Red Globes, and Sweet Flavor (Red), alongside various generic options.



**Green Bell Pepper**

Inventory is critically low. Mexico is seeing very light volume and mixed quality due to weather and insects, while South Florida remains extremely short following freeze losses. Expect high pricing and heavy volatility through mid-April.



**Color Bell Pepper**

Expect ongoing volume shortages out of Mexico due to cold weather and insects, while Florida remains extremely short following last month's freeze. Markets will stay volatile through April, though upcoming Hot House cycles may provide minor relief.



**Mini Sweet Pepper**

Inventory levels are stable for the next several weeks. Quality remains high.



**Mixed Chili Pepper**

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



**Tomatillo**

Supply is beginning to stabilize, with availability and quality expected to improve over the next week. Markets remain firm as Eastern demand shifts toward Mexico following Florida's freeze.



**Eggplant**

Domestic supply is nearly non-existent due to Florida's freeze losses. Crossings through Nogales remain strong, with the best quality currently coming from Mexico.



**Cucumbers**

- **Slicers (ESCALATED):** Crossings through Nogales and McAllen are lighter as peak production passes. Florida remains short, necessitating outside sourcing from Honduras and the Dominican Republic. Volatility will persist through April.
- **English:** Pricing is rising due to lighter supply and moderate demand. Quality remains good out of Nogales and McAllen.



**Green Beans**

Severe shortages continue as Florida growers issue "Act of God" declarations following freeze damage. Mexico is also experiencing a slowdown due to cold weather. Expect significant shortfalls and rising prices through early April.

**French Beans**

Supplies are extremely limited. Frost in Guatemala and cold in Mexico have constrained yields, while a lack of standard Green Beans has further drained available French Bean inventory.



**Zucchini/  
Yellow Squash**

Florida's freeze and lighter crossings in the West have created a severe supply vacuum, driving markets higher. Mexico is providing the best quality, but expect extreme volatility through March.



**Fresh Herbs**

Basil remains inconsistent due to cold in Mexico, rain in Colombia, and frequent USDA holds. While most herbs are steady and chervil supply has improved, tarragon is limited. Arugula and cilantro are currently critically short, with prorates expected from several growers.



**Artichokes**

Quality and supplies are both good.



**Asparagus**

Mexican production remains lower due to cooler weather in the San Luis and Caborca regions, while Peruvian volumes continue to decline seasonally. Markets remain steady despite reduced output, but supplies will stay tight for the next 7-10 days.



**Bok Choy**

Quality and supplies are currently mediocre.



**Borccoli/Crowns**

Supplies have tightened and quality is hit-or-miss. Recent rain and warmth in Yuma have caused browning and pin rot, which will likely persist for the next few weeks. Growers are holding strictly to averages.



**Broccolini/Sweet  
Baby Broccoli**

Supplies are critically limited across most growers due to weather-impacted harvesting. Quality remains good, but expect prorates as low as 20% from some shippers.



**Brussel Sprouts**

Markets are no longer escalated as growing regions shift. While some insect pressure and internal browning persist, overall quality and volume are improving.



**Carrots**

Saturated, muddy fields have made harvesting difficult, leading to tight supplies and limited availability for Baby, Cello, and Jumbo varieties. Mexican volumes are also decreasing seasonally. Expect prorates and place orders at least 7-10 days in advance; Jumbos are currently available for loading in Georgia.



**Cauliflower**

The market remains at extreme levels. While quality is acceptable, inventory has tightened significantly.



**Celery**

Supplies remain severely constrained by weather-impacted harvests. Growers are enforcing strict averages on both value-added and carton celery, with no full relief expected until April.



**Corn**

Florida has lost approximately 80% of its current cycle to the freeze, causing the West to react with historically high pricing. "Act of God" declarations are in effect as growers salvage immature, small-eared crops. Expect extreme volatility through April.



**Fennel**

Shortages continue due to low field yields. Pricing remains high, and some growers are enforcing 8-week averages or issuing prorates.

## FRUITS & VEGETABLES



**Kale**

Weather has disrupted harvesting, leading to limited supplies and average quality.



**Leeks**

Both quality and supply levels are currently adequate but remain on the escalated list.



**Garlic**

Quality is good, though the current crop remains snug. Steady purchasing is recommended to ensure inventory.



**Ginger**

Market and supply levels remain stable.



**Green Cabbage**

Current inventory and quality are solid, but the market is beginning to tighten. Expect further supply constraints as we move through March.



**Green Onions**

Supplies are critically low due to previous rainfall and weather-related harvesting disruptions in Mexico. Yields remain challenging as the transition period approaches, leading to strict enforcement of averages and expected prorates across the industry.



**Mushrooms**

Inventory is projected to remain steady over the coming weeks with good quality.



**Napa Cabbage**

Quality remains high, but supplies have tightened, driving market prices upward.



**Parsley**

Both supply levels and quality are currently in good standing.



**Red Cabbage**

Quality is holding well, though overall supplies are currently light.



**Spinach**

Inventory remains limited as crops face weak texture, wilting, and discoloration. Recent disease and mildew pressure are further reducing harvestable yields.



**Snow Peas & Sugar Snaps**

Guatemalan snow pea supply is steady, and sugar snap availability is improving. However, Mexican volumes for both remain limited as growers transition between fields.



**Onions**

The market is stable with the harvest concluded. Shipping is now exclusive to Pacific Northwest storage, and plentiful availability is expected to favor buyers throughout the quarter with no significant price spikes anticipated.



**Potatoes**

Shipments for the remainder of the year will be supported by storage stocks. Sizing and availability are strong across all categories. The long-term outlook suggests a soft market until late spring, when tightening supplies typically drive pricing higher.



## TOMATOES - USA



### Round & Roma

Markets are expected to be volatile through early May and hit or miss supply over the coming weeks as growers attempt to salvage what they can. We will continue to assess the freeze impacts with our growers and provide updates as soon as possible. We do expect the need to sub sizes and varieties to navigate this unprecedented weather event and are receiving Act of God Declarations from our Florida Partners.

### Grape, Medley, Cherry

Supply was very short this week, and pricing was higher on cherry tomatoes and medley tomatoes; grapes were somewhat stable as it felt like there were a few more grapes on the market this week.



## TOMATOES - MX



### Round

Volume is expected to improve gradually as Sonora begins production. Despite the additional volume, markets remain strong, though quality through McAllen and Nogales remains very high.

### Roma

Late-season blight and reduced planting in Sinaloa have cut projections by over 30%. While new, high-quality crop out of Sonora is starting to offer some relief, Florida's losses will keep the market elevated. Quality is currently mixed, with Sinaloa fruit appearing fair and Sonora fruit looking excellent.

### Grape, Cherry, Medley

Increasing supply and lighter demand have applied downward pressure on pricing this week. Overall quality is outstanding.