

OVERVIEW:

Strong South Florida production continues across several items with good quality and availability, similar in Nogales and McAllen. Tomato volume is stable; Florida harvests new fields, Mexico new regions in Sonora and Baja. Quality is outstanding in all markets. California tomatoes expected early June. Lighter supply: green beans, premium large green bells, pickles, shishitos, habanero, caribe peppers. Western mixed vegetable transition starting; Coachella to harvest peppers, corn, beans next week. Offshore table grape quality and supply stable; Mexico to start in 7–10 days. Offshore melons declining; desert fruit transition in 3 weeks. Banana and pineapple availability limited; flexibility on pineapple sizes requested. Underwhelming Cinco de Mayo avocado sales in 2025 led to price decline, driven by increased COO diversification diminishing Mexico's market dominance (down to 69% last week, expected to decline as Peruvian volumes build to July peak). California peaking on 48s, Colombia on 70s, Peru bringing larger fruit. This shift coincides with Mexico's strongest 6Oct demand since week 8. Market stability expected post-Cinco adjustment. Off-Bloom (Loca/Mendez) crop on track for July 1st start; Jalisco's Mendez 2025–2026 crop forecasted up 7.8% YoY. Michoacán Loca estimate expected soon. Peru's 2025 season preparing for global shipments; initial U.S. arrivals projected late May/early June. Strong size and quality expected; summer promotions planned. Colombia's Travesía crop underway, supplying U.S. and Europe; promising volume on medium/small fruit for promotions as season peaks. Salinas season started with smooth transition. Favorable spring weather with no adverse rain effects reported. Insect pressure from spring rain being monitored; no major reports yet. Lettuce quality and supplies good, expected to improve despite some lighter weights/smaller heads. Brussel sprout supplies light with potential shortages for at least 2 weeks. Quality also an issue; jumbos very limited, sizing leaning small/medium. Growers navigating; some relief expected in May, but market escalated and rising. Endive, escarole, fennel, parsley markets escalated due to supply shortages. Bok choy, napa, and leeks at extreme trigger level. Overall Salinas production steady; hopeful for great season.

ALERT LIST:

ESCALATED

Asparagus, Avocados, Bananas, Blueberries, Organic Celery, Endive, Escarole, Fennel, Anise, Green Beans, Fresh Herbs, Hot Peppers (Caribe, Habanero, Shishito), Limes, Parsley (Italian & Curly)

EXTREME

Bok Choy, Brussel Sprouts, Leeks, Napa Cabbage

WATCH LIST:

Pineapple, Arugula, Broccoli, Green & Red Cabbage, Cauliflower, Celery, Cilantro, Iceberg & Romaine Lettuce, Green & Red Leaf Lettuce, Ginger, Snow Peas & Snap Peas, Spinach, Yellow Squash, Eggplant, Small Size Oranges & Lemons



Strawberries – Light supplies this week due to cool temperatures and rain; lower volumes expected next week. Santa Maria strong green fruit sets; production to ramp with warmth and piece-rate. Region slightly behind; peak now mid-May, later into June. Oxnard volume building with favorable weather flush; past peak, rapid decline to Salinas/Watsonville. Salinas/Watsonville production to gradually increase; more consistent mid-May.



Blackberries – Strong quality: medium-large, good sheen, firm, mostly black. Some concerns: red cell, calyx, occasional soft/leaking. Volume steady peak, expected through July. Organic volumes declining; season ending slightly early.



Raspberries – Overall volumes to gradually increase towards late May/early June peak. Baja and California trending up to peaks. Mexico stable next month, then gradual decline.



Blueberries – Overall volumes modestly up; substantial gains by mid-May. Georgia increasing, past low; significant improvement mid-to-late May. Georgia delayed by weather; growth expected next week. Mexico declining faster; Florida limited by quality. California Central Valley behind; light harvest starting. More volume mid-May.



Cucumbers – Slicer: Lighter Nogales/McAllen and Honduras supply. Tighter selects/supers. Good quality, firmer markets due to transition; better volume in two weeks. South Georgia expected to start May 10th. English: Good Mexico supply. Good quality on new Mexico crop.



Green Onions – Good supplies and quality, but initial reports of light supplies.



Potatoes – Stable market, carton production down. Norkotahs ending soon, shifting to Burbanks, reducing production. Some market increases expected. Stronger market possible with demand. Similar acreage planting in April. Concern about similar supply next year.



Broccoli, Florets & Crowns – Good quality. Demand exceeding tight supplies; market rising but likely short-lived.



Tomatoes – East Coast Round Tomatoes peaking in Florida; Romas lighter volume, higher markets, outstanding quality. Snacking Tomatoes (Cherry, Grape, Medley) stable supply, outstanding quality. Mexico Round Tomatoes steady smaller sizes from Sonora/Sinaloa, larger tighter; outstanding quality from new regions, mixed from Sinaloa; Baja starting this week. Roma Tomatoes ample supply from Sonora/Sinaloa crossing Nogales/McAllen; good quality Sonora/Jalisco, fair Sinaloa; light Baja crossings. Snacking Tomatoes (Cherry, Grape, Medley) steady supply, light demand lowering FOB, good quality. Tomato on the Vine stable volume. California forecasted to start early June.



Broccolini/Sweet Baby Broccoli – Good quality expected, most growers good supplies.



Chili Peppers – Generally good Mexico supply, mixed quality. New Sonora fields coming, improving supply/quality. Jalapeño/Poblano good. Caribe, Habanero, Shishito shorter. California to start early June, South Georgia by second week of May.



Avocados – U.S. avocado industry closed last week at 63.6M pounds, up 21% from prior week, but below 70.5M pound projections post-Holy Week. Inventory higher this week for Cinco de Mayo promotions. Strong demand and steady pricing for small fruit. Improved market conditions and availability for medium/large sizes due to consistent Mexico and California supply. Mexico continues high Grade 2 production, expected to persist. California delivering strong volumes with excellent quality. Peru's 2025 season has begun, ramping up for June summer demand. Current dry matter: Mexico Main Crop 35.2%, California 26%.



Melons (Cantaloupe/Honeydew) – Strong retail demand, vessel delays shortened cantaloupe; FOB firm. Offshore to desert May 19th; offshore volume decreasing. Excellent cantaloupe quality, strong shelf life/color, Brix 14–16%; sizing shifting to 9s/12s, 15s limited. Honeydew production dropping, sizing strong 5s–5Js; 6ct very limited. Some scar, overall solid quality, Brix 12–14%. More Mexican honeydew possible.



Asparagus – Caborca/San Luis production ended; Baja harvesting, low volume. Peruvian supply building, less active market, increased availability. Peruvian white asparagus declining due to season/transitions.



Artichokes – Good quality and supply.



Corn – Excellent supply Coachella/Brawley started, steady Florida volume. Mexico nearly done. Domestic quality good.



Parsley – Good supplies and quality.



Green, Red & Napa Cabbage – Napa: Quality/supplies improving, but some insect pressure. Red: Good quality, but continued light supplies with some growers. Market remains very active.



Cauliflower – Good quality, okay supplies. Growers somewhat light, but demand not high.



Fennel – Lower yields causing supply shortage. Pricing escalated until supplies improve.



Kale – Supplies improved, good quality, but watchlist due to potential insect pressure.



Bell Peppers – Nogales seeing short green supply, especially large. Coachella in full green production, good supply all sizes, large premium. South Florida higher green premium prices, choice plentiful; transition to South Georgia around May 10th. Good supply of color bells in Nogales and South Florida, mostly good quality. Canada limited HH color bells starting, gradually increasing. La Rouge yellow/reds expected from desert and South Georgia by mid-May.



Onions – Market stable until Northwest fully clears (expected May, some leftovers possible). Texas just starting, large crop expected. Southern California to start in ~4 weeks, also large crop expected. Limited Q2 April/May optimism due to ample supply. June uncertain; Texas, Northwest, most of Southern Cal finished, exclusively New Mexico/Central California. Market has equal chance to improve or remain stagnant.



Bok Choy – Good quality, limited supply driving market.



Lettuce, Iceberg & VA Blends – Good lettuce supplies. Lighter weights/smaller heads possible until Salinas settles, but overall good quality. Iceberg VA: Good quality and supplies.



Lettuce, Romaine & VA Blends – Good supplies. Insect pressure and light blistering reported. Romaine VA: Good quality and supplies.



Lettuce, Red & Green Leaf – Good overall quality and supplies. Weights/sizing improving.



Leeks – Very tight supply, some growers holding to averages. Market remains escalated.



Spinach – Good supplies and quality. Minimal reports of weak texture, discoloration, wilting, and insect damage.



Pineapple – Will remain tight; no improvement expected until late May. Suggest size flexibility for supply chain stability. Overall quality and taste are good.



Ginger – Steady supplies and market.



Carrots – Desert regions started with good supply, very good quality. Steady supplies expected through end of desert season (late April/early May).



Celery – Good quality and supplies. Organic market increased.



Brussel Sprouts – Quality/supplies an issue for most growers; industry supply significantly dropped. Expect shortages and market rise. Growers covering 10-week averages. Seeder/sizing lean medium/small. Jumbos very limited. Market extreme.



Lemons – Very good quality across California. Small sizes (165s and smaller) extremely light for 4–6 weeks; mid-to-large (140s and larger) readily available. Market stronger on small sizes. Ample lead time needed for small size orders; many shippers holding to averages.



Limes – Supplies remain light this week, expected to stay limited next week. Shippers recovering from Holy Week. Tight overall supply with increased Cinco de Mayo demand will push market higher. Sizing peaks on smaller fruit (200s/230s/250s); larger sizes limited. Strong market expected for at least next few weeks, especially pre-Cinco de Mayo.



Mandarins/Grapefruit/Specialties – Blood Oranges packing, finishing mid-to-end May; sizing small. Cara Caras available, finishing mid-to-end May. California Mandarins good supply, very good quality. California Grapefruit light Fancy grade supply; Choice grade readily available.



Oranges – Excellent quality. Prices on 88s and smaller (mainly 113s/138s) strengthening as size structure shifts larger. Ample lead time needed for orders, especially small sizes; many shippers holding to averages.



Eggplant – Lighter domestic supply, mixed quality. Good Mexico supply, excellent quality. South Georgia and California to start third week of May.



Watermelon – Supplies lighter, strong Mexico/Florida demand. Smaller sizes tight; new fields mostly larger fruit. Prices expected strong on bins/cartons. Some deals on 11ct minis.



Mushrooms – Promotable volume available, good quality.



Snow Peas & Sugar Snaps – Guatemalan production stable; potential quality concerns due to humidity. Steady production in MX.



Bananas – Imports extremely light for 4 weeks. Record demand and light supply due to tropical weather and global logistics issues over past three weeks. Minor pro-rates possible network-wide over next four weeks. Overall banana quality good despite winter cycle. Advise close monitoring of ripeness; warmer storage or wrapping may be needed. Light inventories lead to higher port/ripening center turns; fruit may not reach optimum color on arrival.



Table Grapes – Stable supply available on colors and varieties. Mexico expected to start in 2 weeks.



Garlic – California Garlic very good quality, lighter supplies. Good demand.



Green Beans – Very light post-Easter Mexico and Florida supply as seasons end. East quality variance due to earlier weather impact. Quality/volume to improve in 2–3 weeks with Coachella and South Georgia transition.



Zucchini/Yellow Squash – Good volume/quality all locations on Mexico/Florida Italian/Yellow. Georgia strong volume all sizes started this week; California still weeks out.



Fresh Herbs – East basil quality challenged by Colombia rain, slow improvement. Limited imported chervil due to Ecuador weather. West supply/quality steady, slow improvement. Both should improve with better weather.



Chayote Squash – Availability continues up and down with typical Veracruz, Mexico weather in Spring – if we see rain soon, plants are happy and we see more volume –if we see the weather go from warm to very hot weather, we see the plants suffer. This is typical and expected. Veracruz is the best growing area for Mexican Chayote, but weather is volatile always. Lower volumes last week and this week.



Cactus Pads/Diced – Better volumes, good weather continues.