

OVERVIEW:

We're still seeing stable South Florida, Nogales, and McAllen production. Tomato markets are tightening due to seasonal transition, with Florida's supply constrained for 3-4 weeks, driving Mexican demand and price increases, particularly for round tomatoes. Yellow Squash, premium Green Bell peppers, Pickles, Shishito, and Caribe peppers also face shortages.

Offshore Table Grapes are stable, Melons show strong volume. Avocado markets remain tight due to border limitations and Mexican holidays, with high demand for smaller sizes and premium prices for larger fruit. Grade 2 fruit prevalence persists. Easter and Cinco de Mayo demand will likely maintain elevated prices through May. California harvests should improve availability by early April, with further stabilization expected from Peru and Colombia in summer. Transition to Huron, Oxnard, and Salinas is underway.

Yuma's heat advisory poses risks of insect pressure and crop fatigue, potentially impacting performance. Lettuce supplies are tightening with reduced weights, and Cauliflower prices are escalating. Insect pressure, especially on Cilantro and Kale, is anticipated.

Broccoli supplies are improving, while Endive, Escarole, Cilantro, and Spinach remain short. Bok Choy, Fennel, and Leeks are critically low. Red Cabbage prices are elevated. Aphid pressure on Arugula, Kale, and Cilantro will be monitored. While growers aim to minimize disruptions, supply and quality challenges are expected.

ALERT LIST:

ESCALATED	EXTREME
Avocados, Broccoli, Red Cabbage, Cauliflower, Cilantro, Endive, Escarole, Fresh Herbs, Caribe Peppers, Iceberg Lettuce, Limes, Napa Cabbage, Parsley, Organic Romaine Hearts, Spinach, Tomatoes	Bok Choy, Fennel, Anise, Leeks

WATCH LIST:

Banana, Pineapple, Arugula, Asparagus, Broccoli, Green Cabbage, Romaine Lettuce, Green & Red Leaf Lettuce, Ginger, Snow Peas, Sugar Snap Peas, Yellow Squash, Eggplant



Strawberries – Supply tightening due to Mexico's seasonal decline. Western US availability limited by rain-related quality issues. Mexico's production is decreasing, with smaller fruit sizes and quality concerns (bruising, soft skin). Florida production is steady, cooler weather may slow short-term production but improve quality. California production to improve gradually as weather stabilizes, but limited availability persists for 7-10 days.



Blackberries – Quality strong, medium to large sizing. Challenges: red cell regression, attached calyx, occasional soft or leaking berries. Volume steady at peak levels through July, slight decline expected end of February. Organic production tapering off.



Raspberries – Quality strong, vibrant red color, good firmness. Overripe/crumbled fruit being removed. Volume consistent peak through April, slight decline end of February. Organic production strong, steady availability through March.



Blueberries – Mexico: Peak conventional production to mid-April, then decline. Organic ended, gap until August. Quality good, some issues. Chile: Season ends early, arriving fruit excellent. Conventional ships through March, limited availability. Organic consistent through March. Oxnard: Organic ramps up, excellent quality, peaks late March. Florida: Conventional starts, cool weather reduced early estimates, strong start expected.



Cucumbers – Slicer: Light supply from Nogales/McAllen/Honduras. Prices firm, quality good. Volume to improve in two weeks. English: Good Mexico supply, good quality. Persian: Baja cold/wet weather slowed growth/harvest, market up. Warmer weather expected.



Green Onions – Good supply and quality, some light supply reports.



Potatoes – Market stable, carton production declining. Norkotahs phasing out in 3–4 weeks, shifting to Burbanks, reducing supply. Market increases expected with reduced supply. Demand surge could significantly strengthen market. Planting in April, acreage similar to current year. Concerns about continued depressed market conditions next year if yields remain consistent.



Broccoli, Florets & Crowns – Good quality and supply. Mini Florets tight, but improving. Transition may cause issues.



Tomatoes – East Coast: Tomatoes: Round/Roma prices high, low winter crop yield, light volume 3 weeks, good quality. Snacking: Prices up, light supply, high demand, good quality. Mexico: Tomatoes: Round/Roma prices up, Florida shortage drives demand, Sinaloa dip, continues until Sonora, fair quality. Snacking: Grape prices up, light supply, high demand, Cherry/Medley flat, good quality. Vine: Light volume.



Broccolini/Sweet Baby Broccoli – Good quality and supply.



Chili Peppers – Sinaloa supply tightening, quality variable. Sonora/Baja harvesting inconsistent. Strong market, high activity. Some zones empty, others starting. Domestic Mexican market active, driving farm-level cash demand and price increases.



Avocados – Prices elevated. Last week saw 58M pounds total avocado volume, with Mexico's supply increasing by 42% due to strong ongoing harvests. The US market faces strong competition with Mexico for smaller-sized fruit, driven by increased domestic demand in Mexico during the Lent season. California's recent rainfall limited their harvest; year-to-date rainfall is 80% of average in Central California, and 43% in Southern California. Volumes are projected to increase starting in April from California, with strong supply expected through September. Mexican main crop dry matter averages 33.2%, while California's averages 24%.



Melons (Cantaloupe/Honeydew) – Cantaloupe: Optimum quality, high color, good size range available, Brix 13–15%, excellent flavor. Honeydew: Honduras production peaking, rapid decline next week, sizing peaks on 5/6s, some aged fruit being rotated, increased arrivals expected Friday, Brix 12–14%.



Asparagus – Supply down due to rain/winds in Caborca/San Luis. Active markets, higher prices expected.



Artichokes – Good supply and quality.



Corn – Stable supply and good quality from Mexico/Florida.



Parsley – Good supply and quality. Prices high.



Green, Red & Napa Cabbage – Green: Good supply and quality. Napa: Improving quality and supply, insect pressure present. Red: Limited supply, good quality. Prices high.



Cauliflower – Supply limited, driving market. Prices high through transition.



Fennel – Supply shortage due to low yields. Prices high until supply improves.



Kale – Improved supply, good quality. Insect pressure possible.



Bell Peppers – Green: Supply light in Nogales/Florida. Prices high, quality mostly good. Other Colors: Good supply in Nogales/Florida. Quality mostly good.



Onions – Market stable until Northwest supply depletes (May). Texas crop large. Southern California starts in four weeks, large volume expected. Q2 April/May outlook: low optimism. June market uncertain, Texas/Northwest/Southern California finished. New Mexico/Central California supply begins, potential for market improvement.



Bok Choy – Supply very limited, driving market. Quality good.



Lettuce, Iceberg & VA Blends – Prices high. Supplies tightening due to transition. Quality/supply issues possible. VA: Quality/supplies good, transition may cause issues.



Lettuce, Romaine & VA Blends – Supply good, market rising. Insect pressure a factor. Organic Hearts prices high, limited supply. VA: Quality/supplies good, transition may cause issues.



Lettuce, Red & Green Leaf – Quality/supplies good, transition may cause issues.



Leeks – Very tight supply, limited grower availability. Prices high.



Spinach – Good supply and quality. Some texture/discoloration issues, insect damage reported. Prices high.



Pineapple – Supply tight, expected to improve late February, peak in May. Size flexibility required.



Ginger – Steady supply and market.



Carrots – Good desert supply and quality, steady supply through late April/May.



Celery – Good quality and supply. Organic supply limited.



Brussel Sprouts – Good quality and supply.



Lemons – Good supply, very good California quality.



Limes – Prices high. Yields declining, small sizes dominant (200s–250s), large sizes limited. Quality improving, fewer defects. Expect higher prices next week.



Mandarins/Grapefruit/Specialties – Blood Oranges ending. Caras ending in one month. California Mandarins, Grapefruit: good supply, very good quality.



Oranges – Excellent California quality, strong supplies. Small size pricing rising, market stable.



Eggplant – Light domestic supply, mixed quality. Good Mexico supply, excellent quality.



Watermelon – Seedless prices rising, reduced Guatemala/Mexico supply, demand exceeds supply, limited arrivals.



Mushrooms – Promotable volume, good quality.



Snow Peas & Sugar Snaps – Guatemalan production down due to humidity, potential quality issues. Steady Mexican production.



Bananas – Supply limited, improving. Tropical weather/logistics impacted imports. Pro-rates should subside. Quality good. Monitor ripeness due to rapid inventory turnover.



Table Grapes – Stable supply of white, red, globe, and black varieties from Peru and Chile. Quality good.



Garlic – Good California quality, light supply, good demand.



Green Beans – Excellent supply, good quality from Nogales/Florida.



Zucchini/Yellow Squash – Good Italian volume/quality. Yellow markets tight, improvement expected in two weeks with Sonora transition. Eastern Yellow tight until May.



Fresh Herbs – Prices high. Basil supply/quality marginal due to cold/rain. Tarragon/other herbs affected. Supply to improve in two weeks, weather permitting. Arugula/Cilantro limited, frost damage, small bunches, purple stems, mechanical issues. Prorating in effect.



Chayote Squash – Veracruz heat impacting quality, potential fruit loss, shipping volumes down next week. Rain needed.



Cactus Pads/Diced – Volumes improving, fair weather. Cold fronts hinder volumes. Active Easter market.