

OVERVIEW:

The produce market is facing challenging conditions due to a recent cold front impacting growing regions. Of particular concern is the significant frost damage in Yuma, Arizona. Crops such as lettuce (especially green leaf and romaine) and artichokes have been hit hard, showing signs of blistering, weak tips, and epidermal peeling. While harvest crews are working diligently to salvage what they can, this damage will undoubtedly lead to lighter weights and potential supply shortages for lettuce in the coming weeks. Even with warmer temperatures expected, the effects of this frost will linger, impacting availability and potentially driving up prices.

Beyond Yuma, the cold front is affecting production across the South, potentially impacting availability and pricing for various items. While citrus and peppers remain strong, other items like honeydew and tropical fruits face shortages. Table grapes are progressing gradually with firm pricing. Elevated prices persist for several items due to ongoing supply constraints. Rain and cooler weather are also expected in Mexico, potentially impacting production there. We will continue to monitor these weather impacts on production and supply chains. Please be prepared for potential price fluctuations and availability challenges in the coming weeks, particularly with lettuce and artichokes from Yuma.

ALERT LIST:

ESCALATED	EXTREME
Asparagus, Avocados, Bananas, Red Cabbage, Celery, Cilantro, Fennel, Hot Peppers (Shishito), Cantaloupe, Napa Cabbage, Parsley, Spinach, Table Grapes	Bok Choy, Leeks, Honeydew

WATCH LIST:

Pineapple, Broccolini, Green Cabbage, Iceberg Lettuce, Romaine Lettuce, Limes, Ginger, Snow Peas & Snap Peas



Strawberries – Fairly light demand on steady pricing. **Santa Maria** – Volume to remain low until ramping up in early March. Overall good quality. **Oxnard** – winter plant volume increasing week by week. Fair quality at best for summer plants. Overall good quality for winter plants. **C-Mex** volume continuing to ramp up. Strong quality with good sizing. **Florida** production still reduced due to cold weather. Good quality with excellent flavor.



Blackberries – Moderate demand on steady pricing. California volume trending down in Oxnard with good quality. Low and steady volume from Santa Maria and Watsonville with good quality. CMex still increasing weekly with 80% of overall production. Fair to good quality. Baja minimal volume w/ramp expected late this month. Fair to good quality.



Raspberries – Fairly good demand on slightly higher pricing. California minimal volume. Baja remains in flat production. Good quality and flavor w/occ leaky/broken. CMex production flat. Fair to good quality.



Blueberries – Moderate demand on steady pricing. Peru volumes decreasing now and for the next few months. Good quality with some improved condition. C-Mex volumes continue to ramp up. Overall good quality and flavor. Some small production in Oxnard with good quality and very good flavor.



Cucumbers – Slicer and English cucumbers show good supply and quality from Mexico.



Green Onions – Good supply and quality.



Potatoes – Markets are currently stable. Larger sizes are more plentiful. As Norkotah supplies decrease and growers transition to Burbank potatoes in Q2, prices may increase. Current prices are expected to remain the lowest for the foreseeable future.



Broccoli, Florets & Crowns – Improved quality and supply. Cold Yuma mornings are slowing growth. Floret minis are very limited.



Tomatoes – East Coast round and Roma tomatoes are in full harvest, with excellent quality and stable markets anticipated despite cooler weather. Snacking tomatoes also show good supply and quality. Mexican tomato markets report stable supply and good quality for round, Roma, and snacking varieties. Tomato-on-the-vine shows steady volume.



Broccolini/Sweet Baby Broccoli – Good quality and supply.



Chili Peppers – Mixed chili peppers from Mexico have good supply, except for Shishitos which are limited. Domestic supply is below forecast.



Avocado – Avocado prices are escalating due to limited availability of medium and large fruit. Smaller sizes are readily available, but increased demand for larger fruit drives price increases. Strong harvest activity continues, but packhouse capacity remains limited.



Melons – Cantaloupe has good quality but limited supply due to storm damage. Expect higher prices and smaller sizes. **Honeydew** is extremely limited; substitutions may be necessary.



Asparagus – Low volume due to cold weather in Caborca/San Luis. Peruvian volume is decreasing. Expect changes in 7-10 days.



Artichokes – Increased supply and stable pricing. Quality is improving.



Corn – Lighter supply with smaller size and less mature kernels due to cold weather.



Parsley – Improved supply and quality.



Green, Red & Napa Cabbage – **Green:** Improved supply and quality. Cold weather may affect growth. **Napa:** Improving quality and supply, but some insect pressure exists. **Red:** Escalated pricing due to limited supply.



Cauliflower – Improved supply, but fair quality with some texture and damage issues.



Fennel – Lower yields are causing a supply shortage and escalated pricing.



Kale – Improved supply and good quality.



Bell Peppers – Green bell peppers show good supply and quality from Nogales and South Florida. Colored bell pepper markets are easing with increased crossings in Nogales and McAllen.



Onions – Pacific Northwest onion prices typically rise in early Q1. White onion supply is initially limited, with Mexican imports arriving mid-Q1. Red onion prices may stay high until the California spring/summer season. Mexico anticipates a strong onion crop. However, the Texas crop remains unpredictable and could cause price increases later.



Bok Choy – Good quality, but limited supply drives high prices.



Lettuce, Iceberg & VA Blends – Iceberg shows acceptable quality, but lighter weights are expected due to frost damage. Cool temperatures have hindered production and caused harvest delays. VA Iceberg quality and supply are currently good, but cold weather may pose challenges.



Lettuce, Romaine & VA Blends – Romaine lettuce supply is adequate, but frost damage may cause lighter weights. Heart material is increasing. Cold weather may impact future quality and supply. VA quality and supply are currently good, but cold weather may pose challenges.



Lettuce, Red & Green Leaf – Green and Red Leaf lettuce exhibit good quality, weights, and sizing.



Leeks – Very limited supply and escalated pricing.



Spinach – Acceptable supply and quality, but some texture and discoloration issues reported. Rising market.



Pineapple – Pineapple supply remains tight with improvement expected by February's end.



Ginger – Stable supply and market.



Carrots – Limited jumbo carrot supply. Other sizes show good supply and quality.



Celery – Improving quality and supply. Some weak texture and mechanical damage reported. Organic celery is extremely limited.



Brussel Sprouts – Good quality and supply.



Lemons – Strong supply and quality. Larger size ordering recommended in advance.



Lime – Lime markets have weakened due to weather. A new crop with predominantly small fruit is expected. Improved quality is observed, but rain may cause cosmetic defects.



Mandarins/Grapefruit/Specialties – California Mandarins and Grapefruit show improved supply. Cara Cara and Blood Orange volume and quality are increasing.



Oranges – California oranges show excellent quality and abundant smaller sizes. Larger sizes remain limited but are improving.



Eggplant – Eggplant supply is strong from Mexico, with limited domestic availability.



Watermelon – Supply is limited, with low demand. Harvesting is happening in both Central and Southern Mexico



Mushrooms – Stable supply and good quality.



Snow Peas & Sugar Snaps – Limited domestic supply, but steady Mexican production. Guatemalan production is improving, but humidity may cause quality issues.



Bananas – Supply is critically low, with the shortage expected to worsen next week. Secure any available supply. Color variations may occur.



Table Grapes – In tight supply, but offshore fruit quality is good. Green grape availability increases this week, while red grapes remain limited. Markets should remain firm until Chilean fruit arrives.



Garlic – California garlic has good quality and lighter supply. Strong demand.



Green Beans – Good supply and quality from Nogales and Florida.



Zucchini/Yellow Squash– Volume is lighter due to cooler temperatures, pushing prices higher.