

OVERVIEW:

Critical Supply Concerns: Extremely limited supplies are reported for bok choy and leeks. Spinach is also limited and vulnerable to frost damage. Arugula and lettuce are under close watch in Yuma due to icing from cold mornings and high winds. Banana supplies will be tight this week. Avocado markets remain elevated due to reduced Mexican harvests, smaller fruit sizes, and California rain impacting production. The January storms in Southern California and Baja continue to impact herb production, particularly sage, tarragon, and basil, with recovery expected in early March. Warmer temperatures and rain next week should help normalize conditions. Yuma transfer fees still apply to some items.

Other Market Updates: While Florida production is generally strong, Shishito peppers are scarce. Nogales and McAllen report similar quality and availability. Yellow squash and eggplant supplies are tight. Offshore grape availability has improved, and melons are excellent from ports and Nogales. Rapid port turnover is affecting banana ripening; warming and covering may be needed. Pineapple supplies are limited. Strawberry volumes are steady in most regions, but West Coast supplies are down due to rain, potentially impacting quality. Other Yuma wet vegetable quality is improving, and supplies are stable. Endive, escarole, cilantro, fennel, and spinach supplies are limited. Red cabbage is somewhat limited, but overall cabbage availability is improving.

ALERT LIST:

ESCALATED	EXTREME
Asparagus, Avocados, Red Cabbage, Cilantro, Endive, Escarole, Fennel, Anise, Shishito Peppers, Napa Cabbage Parsley, Spinach	Bok Choy, Fresh Herbs, Organic Celery, Leeks

WATCH LIST:

Banana, Pineapple, Broccolini, Arugula, Green Cabbage, Cauliflower, Iceberg & Romaine Lettuce, Limes, Ginger, Snow Peas, Sugar Snap Peas, Yellow Squash, Eggplant



Strawberries – Demand good on steady pricing with light supplies. Santa Maria – Very low volume. Quality fair to good. Oxnard, very low volume with weather issues and supply gap. C-Mex volume entering peak. Generally good quality. Baja some light volume. Florida volume and quality improving with supply gap approaching.



Blackberries – Good demand on steady pricing. California volume low with good quality. CMex representing with 90%+ of overall production. Overall strong quality. Baja minimal volume.



Raspberries – Good demand with higher pricing on light supply. California and Baja low and steady volumes. Good quality/flavor. CMex production dropping. Quality fair to good.



Blueberries – Good demand on steady pricing. Peru volumes in slow decline. Fair to good quality. C-Mex volumes continue to increase. Overall good quality. Baja continues ramp up. Strong quality.



Cucumbers – Good supply and quality from Nogales/McAllen/Honduras (slicer) and Mexico (English).



Green Onions – Supplies and quality are good.



Potatoes – No major changes expected. Size profiles are balanced. Larger sizes are more plentiful. Norkotah supplies will decrease towards the end of Q1, with a transition to Burbank's in Q2. This may cause supply to tighten and prices to increase.



Broccoli, Florets & Crowns – Supplies and quality have improved. Cold mornings in Yuma are slowing growth, but supplies are steady. Floret minis are very tight.



Tomatoes – (East Coast): Harvesting of round and roma tomatoes is in full swing but may slow due to cooler weather. Stable markets and excellent quality are expected. Good supply and strong quality of snacking tomatoes (cherry, grape, and medley) are available. **Tomatoes (Mexico):** Stable supply and good quality of round & roma are crossing through Nogales & McAllen. Steady supply of snacking tomatoes is available with good quality. Tomato-on-the-vine also has steady volume available this week.



Broccolini/Sweet Baby Broccoli – Supplies and quality are okay, but some growers have very limited supplies.



Chili Peppers – Generally good supplies from Mexico (jalapeño, caribe, serrano, poblano). Shishitos are shortest. Domestic (Florida) supplies are below forecast.



Avocados – Prices are up due to drastically lower harvests (down 40% last week). California harvests dipped, though a rebound is expected. Colombia's production is low but consistent. Smaller sizes are more plentiful; larger sizes are scarce. Rain has increased grade 2 fruit, and packing capacity is limited.



Melons (Cantaloupe/Honeydew) – Yields are normalizing after the November storm. Markets are settling after record high prices. Cantaloupe quality is very strong (good netting, high color, 13-15% brix). Sizing is mostly 9s and 12s. Honeydew market has dropped due to strong Honduras and Mexico production (Honduras impact will be short-lived). Guatemala sizing is peaking on 6s, then 5s and 8s. Honeydew quality is excellent (clean, improving flavor, 12-14% brix).



Asparagus – Supplies are still low despite some improvement. Warmer weather is expected. Peruvian volume is decreasing.



Artichokes – Supplies have improved; the market is no longer tight. Quality is good and improving.



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



Parsley – Supplies and quality have improved.



Green, Red & Napa Cabbage – Green supplies and quality have improved, but cold weather is a concern. Napa supplies and quality are improving, but insect pressure is present. Red prices remain high. Quality is good, but supplies are still light. The market is very active.



Cauliflower – Supplies and quality are good. Weaker texture, mechanical damage, and bruising are reported. Shelf life is good, but frost is slowing growth.



Fennel – Supplies are short due to low yields. Prices are high.



Kale – Supplies and quality have improved.



Bell Peppers – Good supply and mostly good quality from Nogales and South Florida.



Onions – Expect price increases on white and red onions from the Pacific Northwest. White onion supplies are light, with no relief expected until mid-Q1 when Mexico starts shipping. Red onion prices will likely stay high until spring/summer. Mexico's crop is predicted to be healthy, so the market should remain stable. However, the Texas crop is still unpredictable and could impact prices if weather events occur.



Bok Choy – Supplies remain extremely limited, driving the market. Quality is good.



Lettuce, Iceberg & VA Blends – Supplies and quality are okay, but weights are lighter due to frost damage (blistering, peeling, weak tips). Cool temperatures have slowed production, but it's improving. Virginia iceberg is good, but cool weather is a concern.



Lettuce, Romaine & VA Blends – Supplies are okay. Romaine maturity is increasing, but weights may be lighter due to frost. Some peel, blistering, and weak tips are present. Heart volume is slowly increasing. Supplies are steady and should improve with warmer weather. Virginia romaine is good, but cool weather is a concern.



Lettuce, Red & Green Leaf – Quality and supplies are good, but frost damage is visible and could impact supplies.



Leeks – Supplies are extremely tight. The market is high.



Spinach – Supplies and quality are okay, but some weak texture, discoloration, and wilting are reported. The market is rising, and frost is a concern.



Pineapple – Supplies will remain tight until late February, with peak volume in May. Size flexibility is crucial for the next few weeks.



Ginger – Stable supply and market.



Carrots – Jumbo supplies are light, but other sizes/packs are steady with good quality.



Celery – Supplies and quality are improving, but some weak texture and mechanical damage are reported. Organic celery supplies are extremely limited.



Brussel Sprouts – Supplies and quality are good.



Lemons – Desert region season ends mid-February. Overall supply should remain good from other districts, though rain may impact harvest/loading. Quality is good.



Limes – Some sizes are limited. Mexican production has shifted to the new crop. Recent rain has increased oil spots and styler-end breakdown. Smaller sizes are prevalent, and large sizes will be scarce through Q1. Border delays are impacting truck crossings.



Mandarins/Grapefruit/Specialties – California mandarins, grapefruit, Cara Caras, and blood oranges are excellent.



Oranges – California quality and supply are excellent. Larger sizes are increasing, which should stabilize the small fruit market. Rain may cause harvest/loading delays through the weekend.



Eggplant – Limited supply and mixed quality from Mexico; domestic supply is limited.



Watermelon – Stable supply, light demand. Harvests are from Central and Northern Mexico.



Mushrooms – Stable supply and good quality.



Snow Peas & Sugar Snaps – Markets are easing on both coasts. Guatemalan production is improving, but humidity is impacting quality. Mexico production is steady.



Bananas – Supplies are tight but should improve next week. Quality is good, but rapid port turnover may affect ripening; warming/wrapping fruit may be needed.



Table Grapes – Supply is stable for all varieties from Peru and Chile, with good quality.



Garlic – California quality is very good, but supplies are light. Demand is good.



Green Beans – Limited supply and mixed quality from Nogales and Florida.



Zucchini/Yellow Squash– Good volume and quality on zucchini; yellow squash is limited.



Fresh Herbs – Basil, sage, tarragon, and thyme supplies from Mexico are limited due to cold weather. Arugula and cilantro are limited due to frost damage (small, uneven bunches, purple stems, mechanical issues). Proration is occurring.