

## OVERVIEW:

South Florida production is strong with good quality and availability, but Mixed Hot Peppers (especially Shishitos and Serranos) are limited. This trend is mirrored in Nogales and McAllen. Yellow Squash and Eggplant remain tight. Offshore Table Grapes have improved. Melons are showing excellent volume and quality from ports and Nogales. Pineapples are limited across all sizes.

Avocado markets are stronger after reduced Mexican harvests, with large fruit commanding high prices. Mexican grade 2 fruit is high due to field conditions, expected to continue. California harvests are also down due to rain. Mexico's projected avocado crop is down ~20%; updated estimates are coming next week. Small sizes are expected to persist, keeping prices high.

Colombia's Principal Crop continues, with Traviesa Crop transition (smaller sizes, lower dry matter) coming soon.

Yuma's chilly mornings are causing icing (impacting Cilantro, Arugula, Iceberg, Romaine, and other leafy greens), but quality is improving for most other wet vegetables. Endive, Escarole, Cilantro, Fennel, and Spinach are tight. Spinach is a frost concern. Bok Choy and Leeks are critically short. Red Cabbage is slightly tight. Warmer weather and rain next week should improve conditions, though full recovery will take weeks. Increased insect activity (especially aphids on Arugula, Kale, and Cilantro) is expected. Remember: some growers have non-transferable items to Yuma, incurring extra fees.

## ALERT LIST:

### ESCALATED

Asparagus, Avocados, Red Cabbage, Organic Celery, Cilantro, Endive, Escarole, Fresh Herbs, Hot Peppers, Napa Cabbage, Parsley, Spinach

### EXTREME

Bok Choy, Fennel, Anise, Leeks

## WATCH LIST:

Banana, Pineapple, Broccolini, Green Cabbage, Cauliflower, Kale, Iceberg & Romaine Lettuce, Ginger, Snow Peas, Sugar Snap Peas, Yellow Squad, Eggplant



**Strawberries** – Eastern/Midwest steady, West Coast limited by rain. Rain will fluctuate production, but warmer weather should increase volume, higher March yields expected. Healthy plants, but cold may cause gaps. Rain impacts short-term quality/harvest but benefits long-term health. Mexican heat causing uneven ripening; rain expected, volumes declining late February. Florida warm, improving production despite earlier weather issues (hurricane, cold). Cooler temps may slow production. Good quality, some issues (overripeness, soft skin, etc.).



**Blackberries** – High quality, some minor issues. Steady peak volume through July, slight decrease late February.



**Raspberries** – Firm, red, mostly medium. Some overripe/crumbled fruit removed. Peak volume through April, slight decline late February. Excellent organic availability through March.



**Blueberries** – Steady supplies. Warm Mexican temps increasing conventional production, peaking in March. Excellent quality, some frost damage. Peruvian season over. High Chilean temps reducing production. Good quality. Chilean domestic peak, open market declining after February. Chilean organic/conventional available through March.



**Cucumbers** – Slicer cucumbers have good availability from Nogales, McAllen, and Honduras, with good quality. English cucumbers are readily available from Mexico, with good quality on the new crop.



**Green Onions** – Good quality and supplies.



**Potatoes** – Potato markets are stable with balanced size profiles. Volume deals on carton sizes (40/50, 80/90) are alternating weekly. Larger sizes are more plentiful. Norkotah supplies will decrease in late Q1, transitioning to Burbank in early Q2. Burbank yields are anticipated to be lower, potentially tightening supplies and increasing prices. Current prices are expected to be the lowest for the foreseeable future.



**Broccoli, Florets & Crowns** – Good quality and supplies. Floret minis remain tight.



**Tomatoes** – East Coast round and roma tomato harvesting is in full swing, but may slow due to cooler weather this week. Stable markets and excellent quality are expected. Good supplies and strong quality are available for East Coast snacking tomatoes (cherry, grape, and medley). Mexican round and roma tomatoes have stable supplies and good quality crossing through Nogales & McAllen. Mexican snacking tomatoes also have steady supplies and good quality. Tomato-on-vine volume is steady this week.



**Broccolini/Sweet Baby Broccoli** – Okay quality and supplies, some growers very light. Expect allocation in some markets.



**Chili Peppers** – Pricing this winter took a small turn and increased in pricing as volumes fell on most peppers. Along with the volume decreases came more demand as land crossings through Baja into Western U.S. states are all susceptible to increased wait time due to stricter process after the U.S. election.



**Avocados** – Week 7 harvest: 56.4M lbs, 41.8M lbs shipped to US. Jalisco: 9.2% of US volume. Mexico's remaining crop volume decreased by ~20%. Small fruit dominates, high grade 2 percentage. Main Crop dry matter: 31.9%. USDA restrictions limiting packhouse capacity.



**Melons (Cantaloupe/Honeydew)** – Melon yields are returning to normal; prices stabilizing. Honduran production winding down; Guatemala sole source by March. Good supplies of size 9/12 cantaloupes. Overall cantaloupe volume decreasing, potentially increasing prices. Guatemalan fruit shows excellent size, color, and brix (13-15%). Honeydew supplies elevated but should normalize within a week. Honduran fruit larger, Guatemalan smaller. Good quality, brix levels 11-13%.



**Asparagus** – Caborca/San Luis volume increasing, trend continuing through March. Peruvian volume very low (seasonal). Markets less active post-Valentine's Day.



**Artichokes** – Good supplies and quality.



**Corn** – Good quality and steady supplies from Mexico and Florida.



**Parsley** – Good quality and supplies.



**Green, Red & Napa Cabbage** – Green Cabbage: Good quality and supplies Napa Cabbage: Improving quality and supplies, but insect pressure and cooler weather are slowing growth. Red Cabbage: Prices remain high in some markets. Good quality, but some growers have light supplies. Active market.



**Cauliflower** – Good supplies and quality, but some weak texture, mechanical damage, and bruising reported. Good shelf life overall.



**Fennel** – Low yields are causing shortages and high prices.



**Kale** – Improved supplies and good quality, but potential insect pressure bears watching.



**Bell Peppers** – Green and color bell supplies are good in Nogales and South Florida. Quality is mostly good.



**Onions** – Pacific Northwest onion prices (white and red) typically rise in early Q1. White onion supplies are limited, with no relief expected until Mexican imports arrive mid-Q1 (February). Red onion prices may remain elevated until the California spring/summer season. Mexico anticipates a healthy crop, suggesting market stability. However, the Texas crop is unpredictable due to potential weather impacts, which could cause price increases in late Q1.



**Bok Choy** – Good quality, limited supplies. Light supplies driving market.



**Lettuce, Iceberg & VA Blends** – Supplies and quality are good, though weights are still slightly below normal due to frost damage (blistering/peeling). Overall, conditions are improving. Virginia iceberg quality and supplies are good.



**Lettuce, Romaine & VA Blends** – Supplies are good. Romaine maturity is increasing, but weights remain lighter due to frost. Some peel, blistering, and weak tips are present. Heart availability is increasing, leading to better color. Supplies are steady and improving with warmer weather. Virginia romaine quality and supplies are good.



**Lettuce, Red & Green Leaf** – Quality and supplies are generally good.



**Leeks** – Very limited availability; some growers are allocating. Market prices remain elevated.



**Spinach** – Good quality and supplies, but some reports of weak texture, discoloration, and wilting.



**Pineapple** – Pineapples remain tight until the end of February, with peak volume in May. Flexibility in sizes is needed for the next 3–4 weeks.



**Ginger** – Steady supplies and market.



**Carrots** – Desert regions have good supplies and quality. Expect steady supplies through late April/early May.



**Celery** – Improving quality and supplies. Some weak texture and mechanical damage. Growers focused on contracts. Organic celery limited.



**Brussel Sprouts** – Good quality and supplies.



**Lemons** – Good supplies, very good quality from all California growing areas.



**Limes** – Market steady as Mexican production transitions. Demand steady, impacted by extreme weather. Recent Mexican rain increased oil spots and styler–end breakdown. Smaller sizes dominate, expected through Q1. Border delays impacting Mexican truck crossings.



**Mandarins/Grapefruit/Specialties** – California mandarins, grapefruit, Cara Caras, and blood oranges are very good quality.



**Oranges** – California rain slowed harvests, but quality remains excellent with very good supplies. Smaller size (113/138) pricing is firming; overall market stabilized.



**Eggplant** – Mexican supplies are lighter with mixed quality, and domestic availability is limited.



**Watermelon** – Stable supply, light demand. Fruit is being harvested from Central and Southern Mexico.



**Mushrooms** – Stable supply and good quality.



**Snow Peas & Sugar Snaps** – Guatemalan production is good, but high humidity is causing quality issues. Mexican production is steady. Market prices are trending downward.



**Bananas** – Imports slowly improving. Minor prorating possible. Winter quality good, but monitor ripeness. High turnover may impact color.



**Table Grapes** – Stable supplies of white, red, globe, and black varieties from Peru and Chile. Good quality.



**Garlic** – California garlic has good quality but lighter supplies. Strong demand.



**Green Beans** – Supplies are lighter and quality is mixed for Nogales crossings and Florida loadings.



**Zucchini/Yellow Squash**– Italian squash, good volume & quality from all shipping locations, but yellow squash markets are tighter.



**Mexican Maridol Papaya** – Volumes are steady and mostly coming in from Colima and Nayarit, Mexico. Ads in place to keep volumes moving! No change in sight for next month.



**Jicama** – Now in La Paz new crop Jicama – Quality is excellent.



**Chayote Squash** – Never-ending roller coaster on quality and availability. As of late this week, sudden volume increases will decrease prices.



**Loose Poly Radish** – Florida production has picked up thanks to the weather. Duda has asked us to start pushing volume. However, supplies on #2 and secondary labels is pulling down prices. There is inferior quality coming out of California, Yuma, and Mexico, with low price. Expecting prices to drop more next week.



**Parsnips**– Stable. Strong supplies out of Oregon. Great quality & prices. Supplies should run through April/May.



**Turnips**– Oregon crop is finished. Arctic blast of cold finished up the crop. New Crop California has great quality. Prices have stabilized and might start to turn with supplies tightening up.



**Rutabaga** – Strong supplies out of Oregon. Great quality with stable supplies and prices. New crop California also has started. Stable market.



**Beets** –Stable supplies with good quality out of Oregon. Prices are stable. A small drop with increased supplies out of California, Yuma, Texas and Mexico.



**Fresh Herbs** – Cold weather in Mexico is impacting basil supplies and quality, with similar effects on sage, tarragon, and thyme. Expect inconsistent availability for the next few weeks, improving as temperatures rise. Frost damage is limiting arugula and cilantro supplies, causing small, uneven bunches, purple stems, and mechanical damage. Some growers are prorating.