

OVERVIEW:

Market fluctuations are expected. January storms severely impacted herb production in Southern California and Baja, especially sage, tarragon, and basil. Warmer temperatures could improve supply by mid-February, but continued cold could mean shortages into March. Yuma's chilly mornings with winds and freezes are delaying harvests and raising concerns about wind damage. Icing and blistering are affecting leafy greens, particularly arugula and lettuce, which are now being monitored. Most other wet vegetables are improving in quality. Endive, escarole, cilantro, fennel, and spinach remain scarce. Spinach is vulnerable to frost damage. Bok choy and leeks are extremely limited. Red cabbage is slightly improved but slow-growing due to cold; it may soon be off escalation if weather cooperates. Some growers have items not shipping from Yuma, incurring added fees during the Yuma season.

South Florida produce is steady this week with good quality and availability, though hot peppers remain tight. Tomatoes are plentiful and high-quality, mirroring Nogales and McAllen. Offshore table grapes are slow, but prices should improve soon. Honeydew volumes are increasing with new shipments, but size flexibility is needed. Bananas will be tight early next week but should recover. Pineapples are limited in all sizes. Super Bowl demand is uncertain despite ample supply; high prices may hinder promotions, and post-Super Bowl replenishment is expected to be low. Lower field costs could impact harvesting. Mexico's small avocado size could be strategically used for Cinco de Mayo.

ALERT LIST:

ESCALATED

Asparagus, Avocados, Red Cabbage, Cilantro, Endive, Escarole, Fennel, Anise, Fresh Herbs, Cantaloupe, Honeydew, Napa Cabbage, Parsley, Spinach, Table Grapes

EXTREME

Bok Choy, Celery, Leeks

WATCH LIST:

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



Strawberries – Santa Maria: Cool, wet, frost. Cool week, rain chance. Excellent conventional/organic SC, some organic FC defects. Production up, potential Feb gap. Peak: March–May. **Mexico:** Warmer, more volume, more bruising. Peak passed, strong volume mid-Feb, then declines. Counts 18–28, quality focus. Limited organic. **Florida:** Warmer. Freeze impacted estimates. Peak still Feb, reduced. Production/quality improving, counts 18–26, some defects. Available Hinton/Central Florida Cooling.



Blackberries – Good blackberry quality, medium–large size, good sheen/firmness. Some red cell regression, attached calyx, soft fruit. Steady volume through July, reduced next week (pruning). Organic volume down. Freshness best now (TX transfers).



Raspberries – Good fruit, strong red color, mostly medium size. Some overripe/crumbled fruit. Steady raspberry volume through April, slightly reduced next week (pruning). Great organic production, good availability through March. Freshness best now (TX transfers).



Blueberries – Mexico: Warm, conventional volume up, March peak, steady through year. Organic finished. Sizing 14–24mm. Excellent quality, some defects. **Peru:** Finished. **Chile:** Hot, limiting production, ending soon. Good quality, sizing 14–18mm+. Peak shipments Feb, limited open market after. Consistent supply through March. **Oxnard:** Excellent organic quality, sizing 14–16mm. Mostly committed business, limited open market. Peak mid-March.



Cucumbers – Persian: Better supplies out of Baja continue. Good weather preventing price increases. **Hot House or Long English Seedless:** Cold has tightened supplies. prices are slightly increasing.



Green Onions – Good supplies/quality.



Potatoes – No major short-term potato changes. Balanced size profiles, volume deals alternating weekly (e.g., 40/50, then 80/90). Larger sizes more plentiful. Norkotah supplies tapering end of Q1, Burbank transition early Q2. Burbank yields lower, potential supply tightening, price impact uncertain, but market unlikely to be cheaper.



Broccoli, Florets & Crowns – Improved quality/supplies. Cold slowing growth. Mini florets tight.



Tomatoes – East Coast Tomatoes: Full harvest, may slow due to cool weather. Stable markets, excellent quality. Snacking tomatoes: good supply/quality. **Mexico Tomatoes:** Stable round/Roma supply/quality (Nogales/McAllen). Steady snacking tomato supply/quality. Steady TOV volume.



Broccolini/Sweet Baby Broccoli – Good quality/supplies.



Chili Peppers – Normally, January's cold weather limits chili volumes, disrupting US and Mexican markets. This year, Sinaloa's abnormally warm weather has created abundant product and record low prices. No change is expected next week.



Avocado – Improved US inventories, but volumes dropping next week. Prices high, but better supply. Main drop has dry matter. Small sizes plentiful, 48s+ tight. High grade 2 percentage. Strong harvest to replenish inventories.



Melons – Cantaloupe: Good quality, strong netting, 10–12% brix. Mostly 9–12 ct, limited jumbos. Supply improving in 7–10 days. **Honeydew:** Force Majeure over. More supply (Florida), but mostly large (5/5J), few 6/8s. Better 6s availability by Monday. Clean arrivals, 11–13% brix.



Asparagus – Low Caborca/San Luis volume (cold), should improve next week. Decreasing Peruvian volume (quality/seasonality). Cold slowing markets.



Artichokes – Improved supplies, no longer escalated, improving quality.



Corn – Stable supply, good quality.



Parsley – Both quality & supplies improved recently.



Green, Red & Napa Cabbage – Green: Improved supply/quality, steady market, watch list (cold). **Napa:** Improving quality/supplies, some insect pressure. **Red Cabbage:** Escalated pricing, good quality, light supplies, active market.



Cauliflower – Good supplies/quality. Weaker texture, some damage. Good shelf life, but frost slowing growth, watch list.



Fennel – Low yields, supply shortage, escalated pricing.



Kale – Improved supplies, good quality.



Bell Peppers – Good supply (Nogales/South Florida), good quality.



Onions – PNW onion storage prices likely to increase early Q1. Light white supplies, relief not expected until Mexican crop (mid-Feb). Reds likely elevated until CA spring/summer. Healthy Mexican crop expected, stable market anticipated. Texas crop too early to predict, weather could impact, causing price increase late Q1.



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



Lettuce, Iceberg & VA Blends – Okay supplies/quality. Lighter weights (frost damage), weak tips. Cool temps slowing production. On watchlist. **Iceberg VA:** Good, cool weather a potential issue.



Lettuce, Romaine & VA Blends – Okay supplies. Romaine: More maturity, lighter weight (frost), peel/blistering/weak tips. Hearts increasing, lighter color. On watchlist, cold mornings may affect quality/supplies. **Romaine VA:** Good, cool weather may affect.



Lettuce, Red & Green Leaf – Good, frost damage noticeable, may affect supplies.



Leeks – Very tight, some holding averages, escalated market.



Spinach – Okay supplies/quality. Some weak texture/discoloration/wilting. Rising market.



Pineapple – Tight, no improvement until end of February, peak in May. Size flexibility needed.



Ginger – Steady supplies/market.



Carrots – Light jumbo supplies, steady other sizes/packs, good quality.



Celery – Improving quality/supplies. Some weak texture/damage. Contract business covered, some shortages. Organic extreme trigger (light supplies).



Brussel Sprouts – Good quality/supplies.



Lemons – Good supplies/quality. Sizing heavy to smalls, large available (advance ordering recommended).



Limes – Stronger market, higher prices. New crop transition, mostly smalls. Quality improving, rain effects present.



Mandarins/Grapefruit/Specialties – Better mandarin/grapefruit supplies, good quality. Increasing Cara Cara volume. Increasing blood orange volume, good quality.



Oranges – Good California quality/supplies. Sizing heavy to 88s-138s, trending larger.



Eggplant – Good Mexican supply, limited domestic. Good quality.



Watermelon – Stable supply, light demand. Harvest from Central/Mexico.



Mushrooms – Stable supply, good quality.



Snow Peas & Sugar Snaps – Active markets (West). Improving Guatemalan production, humidity may affect quality. Domestic gap, steady Mexican production.



Bananas – Tight imports, improving next week. Tropical weather/logistics impacted supply. Minor pro-rates possible, subsiding this week. Good quality, but watch ripeness. Light inventories, faster turns, may affect color.



Table Grapes – Tight supply, good offshore quality. More greens arriving, reds remain tight. Lingering western reds fair quality. Firm markets until more Chilean fruit.



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



Green Beans – Good supply/quality (Nogales/Florida).



Zucchini/Yellow Squash– Good volume/quality (all locations).



Mexican Maridol Papaya – Steady volumes from Colima and Nayarit, Mexico. Ads are in place to maintain volume. No change expected next month.



Jicama – Steady volumes from Colima and Nayarit, Mexico. Ads are in place to maintain volume. No change expected next month.



Chayote Squash – Volumes are down, and prices are up.



Loose Poly Radish – Cold weather in Arizona and Florida has slowed production and harvesting. Weak late-January demand prevented price increases. Increases are possible next week. Lower-quality "second labels" from California, Yuma, and Mexico are reducing supplies.



Parsnips– Strong supplies out of Oregon. Great quality with stable supplies and prices. Supplies should run through April/May.



Turnips– Oregon's cold, snowy weather will impact quality. New crop from California, Texas, and Arizona supplies are heavy, driving prices down.



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



Beets – Stable supplies with good quality out of Oregon. Prices dropped a little with increased supplies out of California, Yuma, Texas and Mexico.



Fresh Herbs – Basil, sage, tarragon extremely limited, other herbs constrained. Cool temps/winds affecting quality/growth. Warmer weather expected, conditions should improve. Limited arugula/cilantro (frost damage), small uneven bunches, purple stems, mechanical issues. Prorating possible.