

## OVERVIEW:

South Florida's robust production continues, mirroring conditions in Nogales and McAllen. Tomato markets tightened during the winter-to-spring transition, with Florida's supply constricted for 3–4 weeks, driving demand towards Mexico. Expect higher Mexican tomato prices and reduced supply, especially rounds. Yellow Squash, premium Green Bells, Pickles, Shishitos, Red Fresnos, and Caribe Peppers also face shortages. Offshore Table Grape supply is stable, and Melon volumes/quality are strong. Banana and Pineapple availability remains limited, requiring size flexibility. Avocado demand, particularly for small/medium sizes, keeps prices high, with a narrowing large/small price gap. Mexican domestic retention for Lent/Easter tightens supply. Grade 2 fruit from Mexico persists. California production is growing, with potential volatility through April due to Easter/Cinco de Mayo. Post-holiday, increased foreign volume may stabilize markets and lower prices by May.

Strong volumes are projected for next week, but tariff uncertainty may reduce inventories. Transition to Huron, Oxnard, and Salinas is underway, causing expected supply/quality fluctuations. Yuma's heatwave stressed crops, impacting quality and increasing pest pressure, though cooler weather is expected. Lettuce supplies are tightening, and weights are decreasing. Cauliflower has improved. Insect pressure is a concern for Cilantro and Kale. Endive, Escarole, Cilantro, and Spinach remain short. Bok Choy, Fennel, Leeks, and Napa are critically low. Red Cabbage remains slightly short. Insect issues persist in leafy greens throughout March. Growers will aim for consistent supply/quality, but some disruptions are anticipated.

## ALERT LIST:

### ESCALATED

Asparagus, Avocados, Red Cabbage, Cilantro, Endive, Escarole, Fresh Herbs, Caribe Peppers, Limes, Organic Romaine Hearts, Spinach, Tomatoes (Round, Snacking, Roma)

### EXTREME

Bok Choy, Fennel, Anise, Napa Cabbage

## WATCH LIST:

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



**Strawberries** – Supplies are steady, tightening as Mexico/Florida seasons end, shifting to western regions. Santa Maria's weather stabilized post-rain; quality is good despite damage to cleanup passes. Production will increase, peaking mid-April to early May, lasting into June. Organic volume is good, with higher culling. Salinas/Watsonville rain delayed early season; packing begins early April. Florida's heat causes ripening concerns; season ends next weekend.



**Blackberries** – Quality is strong, with size and sheen, but some quality issues exist. Volume is steady through July. Organic volume is declining.



**Raspberries** – Quality is strong, with vibrant color and firmness. Volume is steady through April. Organic availability is solid through March.



**Blueberries** – Mexico's conventional volume peaks through mid-April, declining into May. Organic season ended; gap until August. Quality is excellent, with isolated issues. Chile's season ended early due to heat/rain, with softness/shriveling issues in final shipments. Organic production in the warmed up region is peaking through April after rain delays. Florida's conventional production is underway, delayed by rain, peaking in April and declining in May.



**Cucumbers** – Slicer: Light supply through Nogales/McAllen/Honduras. Quality good, markets firm due to transition; better volumes in two weeks. English: Good Mexican supply, good quality. Persian: Baja harvesting is back to normal after cold/wet weather, with warmer days expected.



**Green Onions** – Good supply/quality, light supply reports.



**Potatoes** – Market is stable, carton production declining. Norkotahs phasing out in 3–4 weeks, shifting supply to Burbanks, reducing overall production. Market increases are expected with reduced supply. Increased demand could significantly strengthen the market, which is uncertain. April planting acreage is expected to be similar to this year. Concerns exist about continued depressed market conditions next year if yields are consistent.



**Broccoli, Florets & Crowns** – Good quality/supply, mini florets tight, florets/crowns tightening; potential issues from heat.



**Tomatoes – East Coast:** Round/roma tomato production is very low, driving high prices until the spring crop starts in three weeks; quality is good. Snacking tomato supplies are light, pushing FOB prices up; quality is good. **Mexico:** Florida's light supply and Sinaloa's production dip increased round/roma tomato demand and prices in McAllen/Nogales; expect this trend until Sonora production increases; quality is fair. Grape tomato FOB prices are up, cherry/medley are flat; overall quality is good. Tomato on the vine volume is light.



**Broccolini/Sweet Baby Broccoli** – Good quality/supply, monitoring transition.



**Chili Peppers** – Sinaloa supplies are tightening due to tired fields and quality checks. Sonora and Baja are inconsistent. Markets are strong, with high grower pricing and domestic Mexican demand. Easter season is driving activity.



**Avocados** – Week 12 saw a 65.5M pound harvest, with 50.9M pounds shipped to the U.S. Jalisco supplies 7.6% of Mexico's U.S. volume. The market corrects for supply/demand. USDA reports increases in larger sizes, softening in smaller sizes. Mexico's Main Crop dry matter is 33.2%. California's harvest was 7.7M pounds (25% dry matter), expected to increase through April, weather permitting. Colombia's Travesia Crop begins with limited small/medium sizes; increased availability is expected late April–summer, peaking May–July (weather dependent). Strong volume is projected next week, but tariffs may reduce inventory.



**Melons (Cantaloupe/Honeydew)** – Cantaloupe: Optimum quality, high color fruit. Sizing peaks on regular 9s, then jumbos, then 12s. Good size range available. Brix levels 13–15%, excellent flavor. Honeydew: Honduran production peaked, rapid drop expected in seven days. Sizing peaks on 5/6s. Aged stored fruit is being rotated out. Increased arrivals expected by Friday. Brix levels 12–14%.



**Asparagus** – Low Caborca/San Luis volume due to weather, markets rising due to decreased Mexican volume; further increases expected.



**Artichokes** – Good supply and quality.



**Corn** – Stable supply, good quality from Mexico/Florida.



**Parsley** – Good supply/quality.



**Green, Red & Napa Cabbage** – Green: Good supply/quality. Napa: Improving supply/quality, insect pressure. Red: Escalated pricing, light supply, good quality.



**Cauliflower** – Okay supply, potential changes with Salinas transition.



**Fennel** – Short supply due to low yields, escalated pricing.



**Kale** – Improved supply/quality, monitoring insect pressure.



**Bell Peppers** – Green: Supply is light in Nogales/Florida; markets are higher, quality mixed. Large sizes are limited, medium/choice volumes stable. Colored: Good supply in Nogales/Florida, good quality. Canadian greenhouse bells are starting with limited volume, increasing in weeks.



**Onions** – Market stability expected until Northwest supplies are depleted, likely May. Texas has a large crop, and Southern California starts in four weeks, also with high volume. April/May outlook is not optimistic. June is uncertain, with Texas, Northwest, and most of Southern California finished, leaving New Mexico and Central California, providing potential for market change.



**Bok Choy** – Limited supply, driving high market prices; good quality.



**Lettuce, Iceberg & VA Blends** – Supplies are tightening due to transition; potential quality/supply issues expected. Heat-related wilting and weak tips reported. Virginia Iceberg quality/supply is currently good, but transition issues are possible.



**Lettuce, Romaine & VA Blends** – Supplies are good, but the market is rising due to increased demand. Warm weather has increased insect pressure. Organic Romaine hearts are limited. Virginia Romaine quality/supply is currently good, but transition issues are possible.



**Lettuce, Red & Green Leaf** – Overall quality/supply is good, but potential transition issues are expected.



**Leeks** – Very tight supply, escalated market.



**Spinach** – Good supply/quality, reports of texture/discoloration/wilting/insect damage.



**Pineapple** – Supply remains tight, improving in May; size flexibility is advised.



**Ginger** – Steady supply/market.



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



**Celery** – Good quality/supply.



**Brussel Sprouts** – Good quality/supply.



**Lemons** – Rain slowed harvest, but improved weather will yield good supply and quality from California. Smaller sizes are limited; larger sizes are readily available.



**Limes** – Yields are declining, peaking in smaller sizes (200s, 230s, 250s); large sizes are very limited. Quality is improving. Tariffs are causing market instability, with growers reducing operations.



**Mandarins/Grapefruit/Specialties** – Blood oranges are ending their season. Cara Caras will finish in about a month. California mandarins and grapefruit have good supply and quality.



**Oranges** – Excellent fruit quality. Smaller size prices are rising due to size structure changes, but the market is stable. Harvests resumed post-storm, ensuring good supply.



**Eggplant** – Light domestic supply, mixed quality. Good Mexican supply, excellent quality.



**Watermelon** – Seedless watermelon prices rising due to reduced Guatemalan/Mexican fruit. Demand exceeds supply.



**Mushrooms** – Promotable volume, good quality.



**Snow Peas & Sugar Snaps** – Steady Guatemalan production, potential quality issues from humidity. Stable Mexican production.



**Bananas** – Imports are low, improving slowly. Tropical weather and logistics impacted supply. Minor pro-rates are possible, but should subside. Winter quality is good; monitor ripening, warmer storage may be needed. Low inventory leads to rapid turnover, impacting color.



**Table Grapes** – Stable supply of varieties; Mexico begins in four weeks.



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



**Green Beans** – Excellent supply and quality from Nogales/Florida.



**Zucchini/Yellow Squash** – Good Italian volume/quality. Yellow markets tight, improving in two weeks with Sonora transition. East coast yellow tight until South Georgia in May.



**Fresh Herbs** –Basil supply/quality is marginal due to cold/rain. Tarragon and other herbs are similarly affected. Supply should improve in two weeks with better weather. Arugula and Cilantro are limited due to frost damage, causing small, uneven bunches, purple stems, and mechanical issues; prorating is occurring.



**Chayote Squash** – Veracruz availability fluctuates with spring weather; rain increases volume, heat decreases. Typical volatile weather for this region.



**Cactus Pads/Diced** – Volumes are improving, good weather. Easter season is driving active markets.