

OVERVIEW:

South Florida expects strong, high-quality production across various commodities, similar to favorable conditions in Nogales and McAllen. Tomato supplies are stable with new fields in Florida and harvests starting in Sonora/Baja, Mexico; quality is excellent everywhere. Yellow Squash, premium Green Bells, Pickles, Shishitos, Habanero, and Caribe Peppers have tighter supplies. The Western mixed vegetable transition begins with limited Coachella harvests of peppers, corn, and beans this week. Offshore Table Grape and melon quality/supply are steady. Banana and Pineapple availability is limited, requiring flexible Pineapple sizing. The Avocado market remains strong, though this week's harvest is lighter than anticipated. Approaching Holy Week will reduce harvest activity to early next week, decreasing fruit availability and increasing field prices. Demand for small/medium avocados is high pre-Cinco de Mayo. A large portion of small Mexican avocados stays domestic for Lent/Easter. Mexico continues to see high Grade 2 avocado percentages. California's increasing harvest offers some supply relief. While all avocado grades/sizes are pricier, anticipated higher May/June volumes from Colombia/Peru should stabilize the market.

The West Coast transition is active in Huron, Oxnard, and Salinas; most growers are in Salinas, with the rest moving next week. Warm Yuma weather has stressed some crops, increasing insect pressure, mildew, internal burn, and fatigue, potentially causing inconsistent performance. Salinas weather looks good for next week with mid-70s temperatures and good quality/supplies. Lettuce supplies will tighten with lighter weights in some markets as the last growers transition, typically raising prices and lowering yields, though the current outlook is good. Spinach was most affected by heat, but damage seems minimal. Endive, Escarole, Cilantro, and Parsley remain expensive due to shortages. Fennel is still elevated. Spinach and Red Cabbage are off escalation but on watch. Bok Choy, Fennel, Napa, and Leeks are at extreme price levels. Insects remain a Yuma issue, well-managed by growers. While they aim for consistent supply and quality during the transition, some issues are possible. The transition has been smooth so far, and we hope this continues.

ALERT LIST:

ESCALATED

Asparagus, Avocados, Cilantro, Endive, Escarole, Fennel, Anise, Fresh Herbs, (Caribe, Habanero & Shishito Peppers, Limes, Italian & Curly Parsley, Organic Romaine Hearts

EXTREME

Bok Choy, Leeks, Napa Cabbage

WATCH LIST:

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



Strawberries – California supplies are rising with warmer weather and good quality, now the sole Western producer as Florida finishes. Strong green fruit sets indicate significant production increases as piece-rate picking begins. Peak production is expected mid-April to early May, extending into June for later plantings. Oxnard volume will steadily increase, peaking in late April. Salinas/Watsonville anticipates rising volume with stable weather.



Blackberries – Quality remains strong (medium-large, good sheen, firm, mostly black). Some quality concerns: red cell regression, attached calyx, occasional soft/leaking fruit. Volume is stable at peak, expected through July. Organic volume is declining as the season ends earlier than expected.



Raspberries – Overall volumes are expected to gradually increase towards a late May/early June spring peak. Baja and California are trending upward to their peaks. Mexico's volume will remain stable for the next month, then gradually decline.



Blueberries – High volume expected in the coming weeks. Mexico's conventional production peaks through mid-April, then gradually declines in May (hot days, cool nights support strong output; excellent quality with some isolated issues). Florida is at peak but will decline sharply in May (early cooler weather/rain delayed harvest).



Cucumbers – Slicer: Lighter Nogales/McAllen/Honduras crossings. Short supply, especially selects/supers. Good quality, firmer markets due to transition; better volume in two weeks. English: Good supply crossing from Mexico this week. Good quality on new Mexican crop. Persian: Cold, wet weather in Baja has ended, and harvesting is back to normal with warmer, sunny days expected.



Green Onions – Good supplies and quality, but some initial reports of light supplies.



Potatoes – Stable market, but carton production declining. Norkotahs ending in 3–4 weeks, reducing supply. Market increases likely with lower production. Demand could further strengthen market. Next season's planting similar acreage; concern about continued low prices if yields stay consistent.



Broccoli, Florets & Crowns – Good quality and supplies reported. Floret minis are tight; Florets/Crowns tightening. Potential supply/quality issues expected due to heat and transition.



Tomatoes – East Coast: Florida is peaking on round and Roma production with outstanding quality. Snacking tomatoes (cherry, grape, medley) have stable supply and outstanding quality. **Mexico:** Sonora and Sinaloa have steady round tomato volume (all sizes, outstanding quality) and ample Roma supply (good quality, crossing Nogales/McAllen). Snacking tomatoes (steady supply, light demand) have downward FOB pricing pressure, but good quality. Tomato on the vine has stable volume.



Broccolini/Sweet Baby Broccoli – Good quality reported, and most growers have good supplies. Monitoring during transition.



Chili Peppers – Sinaloa, Mexico's chili pepper season is ending with tightening supplies and tired plants, prompting a move to Sonora. Baja's chili harvest has slowed for a few weeks. Strong, active markets continue across all chili types, fueled by strong domestic Mexican market activity and typical Easter season demand in April, leading to firm grower pricing.



Avocados – Avocado volume fell sharply to 48M pounds (–37% weekly, Mexico –46%), below the projected 64M due to prior tariff uncertainty. Smaller sizes dominate; larger are scarce. Grade 2 fruit is prevalent and increasing. USDA packhouse restrictions limit supply. California's week 14 harvest: 10.7M pounds (25% dry matter), peaking on 48s/60s. Expect increased harvest near Cinco de Mayo despite earlier weather delays. Main Crop dry matter: 34.5%.



Melons (Cantaloupe/Honeydew) – Stronger retail demand and vessel delays have tightened the cantaloupe market, increasing FOB pricing. Offshore program transition to desert expected May 19th. Cantaloupe quality is excellent with good shelf life, high color, and mostly 14–16% Brix; sizing shifting from jumbo to 9–12ct. Honeydew production is strong, peaking on 5s–5Js; 6ct very limited. Some scarring noted, but overall quality solid (12–14% Brix).



Asparagus – Caborca/San Luis volumes remain low due to weather/seasonal decline. Peru shipments have begun, with first arrivals last week. Improved volume expected post-Easter, easing supply pressure. Active markets due to reduced Mexican volume; firm until Peruvian shipments stabilize.



Artichokes – Good quality and supply.



Corn – Lighter Mexican supply; steady Florida volume. Coachella volume ramping up. Good domestic quality.



Parsley – Good supplies and quality.



Green, Red & Napa Cabbage – Green: Good supplies and quality reported, but monitoring for potential issues. Napa: Improving quality and supplies, but some insect pressure noted. Red: Good quality, but supplies still light with some growers. Market remains active.



Cauliflower – Supplies are currently okay. Heat helped remaining Yuma crops, but potential changes as transition to Salinas occurs.



Fennel – Lower yields causing supply shortage. Pricing will remain high until supplies improve.



Kale – Improved supplies and good quality, but monitoring for potential insect pressure.



Bell Peppers – Lighter green supply in Nogales/South Florida with higher, mixed quality markets. Limited large green sizes; stable medium/choice. Good supply of color peppers in Nogales/South Florida, mostly good quality. Limited Canadian HH color peppers crossing now, increasing over weeks. Light green availability expected from Coachella in two weeks. Desert yellow/red color peppers (La Rouge) expected mid-May.



Onions – Market expected to remain stable until Northwest supplies are depleted (anticipated in May, with potential lingering product). Texas crop is starting strong and expected to be large. Southern California starts in about 4 weeks with a large crop also expected. Limited optimism for April/May. June is uncertain; Texas, Northwest, and most of Southern California will be finished, transitioning to New Mexico and Central California, offering a fresh start for the market.



Bok Choy – Good quality, but supplies remain limited, driving the market.



Lettuce, Iceberg & VA Blends – Supplies tightening with transition. Potential quality/supply issues possible but currently good. Some reports of heat-related wilting/weak tips on outer leaves, but overall quality is still good. Iceberg VA: Good quality and supplies for now, but potential issues during transition.



Lettuce, Romaine & VA Blends – Supplies are good, but market trending higher due to increased demand. Warmer weather causing reported insect pressure and light blistering. Organic Romaine hearts remain escalated due to limited supply. Romaine VA: Good quality and supplies, but potential issues during transition.



Lettuce, Red & Green Leaf – Overall good quality and supplies, but potential supply and quality issues possible during transition.



Leeks – Very tight supplies with some growers holding to averages. Market remains high.



Spinach – Good supplies and quality reported. Minimal reports of weak texture, discoloration, wilting, and insect damage.



Pineapple – Pineapple supply will remain tight until late May. Prioritize size flexibility to ensure supply chain stability. Current quality and taste are good.



Ginger – Steady supplies and market.



Carrots – Desert regions have started with good supplies and very good quality. Steady supplies expected through the desert season (late April/early May).



Celery – Good quality and supplies.



Brussel Sprouts – Good quality and supplies.



Lemons – Very good quality across California growing areas. Smaller sizes will be lighter in supply for the next 4–6 weeks; mid-to-large sizes remain readily available.



Limes – Steady demand with smaller sizes (200s/230s/250s) peaking; large sizes are limited. Quality and condition are better. Market steady for large, slightly weaker for small sizes.



Mandarins/Grapefruit/Specialties – Blood Oranges packing soon ending; running small. Cara Oranges finishing in about a month. California Mandarins and Grapefruit are in good supply with very good quality.



Oranges – Excellent fruit quality and eating. Smaller sizes (113s/138s) pricing is rising due to a shift towards mid-sizes; allow lead time for small size orders.



Eggplant – Lighter, mixed quality domestic supply continues. Good supply and excellent quality from Mexico this week.



Watermelon – Supplies should slightly increase from Mexico/Florida, but smaller sizes remain tight with new fields yielding larger fruit. Slow demand due to cooler weather. Strong pricing expected on 45s/60s, while 36s remain slow with rising volume.



Mushrooms – Promotable volume available and good quality.



Snow Peas & Sugar Snaps – Guatemalan production steady, but humidity may cause quality issues. Mexican production stable with no major concerns.



Bananas – Banana imports are currently low but will gradually improve with vessel arrivals. Recent tropical weather and logistics impacted global supply. Minor pro-rates possible this week. Monitor ripeness closely due to light inventories and fast turnover; consider warmer storage. Current quality is good.



Table Grapes – Table grape supply across colors and varieties is stable. Anticipate the start of the Mexican season in four weeks.



Garlic – California Garlic showing very good quality with lighter supplies. Good demand.



Green Beans – Excellent supply, but variable quality due to earlier weather impacts. Stable Nogales/South Florida volume expected.



Zucchini/Yellow Squash – Good Italian volume/quality from all locations; tight yellow markets. Yellow should improve with Sonora transition next week. Eastern yellow likely tight until S. Georgia in May.



Fresh Herbs – In the eastern regions, basil and mint quality has been impacted by ongoing rain in Colombia, while the supply of imported chervil is down due to adverse weather conditions in Ecuador. On the West Coast, basil supply and quality are gradually improving, though the recovery has been slower than anticipated. Continued improvement is expected in the coming weeks as weather conditions stabilize across key growing regions. Overall, Arugula and Cilantro are in limited supply due to frost damage, resulting in small, uneven bunches, purple stems, and mechanical issues. Some growers are implementing prorating because of these challenges.



Chayote Squash – Availability in Veracruz, Mexico fluctuates with typical spring weather. Rain benefits volume, while a shift to very hot weather negatively impacts plants. This volatility is expected in Veracruz, the primary Mexican growing region.



Cactus Pads/Diced – Volumes are improving with continued good weather. Active markets are expected through April in both Mexico and the U.S. due to the Easter season.