

OVERVIEW:

South Florida continues strong production with good quality across several items, similar to Nogales and McAllen. Tomato volume is stable with excellent quality from new harvests in Florida and Mexico (Sonora/Baja); California expects tomatoes in early June. Lighter supplies include green beans, premium green bells, pickles, shishitos, habanero, and caribe peppers. Western mixed vegetable transition starts with initial Coachella harvests this week. Holy Week may cause delays.

Offshore table grape quality/supply are stable; Mexico anticipates starting within 14 days. Offshore melon volumes are decreasing, transitioning to desert fruit in 3-4 weeks. Banana/pineapple availability is limited. Avocado market remains strong, but Mexican harvest volumes will be limited this week due to Holy Week (no harvest Thu-Sun), impacting Cinco de Mayo promotions. Smaller Mexican avocados are also retained domestically. High Grade 2 percentage from Mexico is expected to continue. California's strong avocado harvest provides key support; Mexico influences the market until Peru/California peak in early June.

Leafy green transition to Salinas is nearly done. Yuma's warm weather stressed remaining crops. Salinas weather is good. Some markets may see tighter lettuce supplies/lighter weights with final transitions. Spinach was most affected by Yuma heat. Endive, escarole, and parsley remain escalated due to shortages. Fennel is still escalated. Cilantro is on a post-transition watchlist. Bok choy, fennel, napa, and leeks remain at extreme trigger.

Brussel sprout supplies have significantly dropped industry-wide; expect more shortages next week. Growers are managing ongoing bug issues in Yuma. The overall transition has been smooth so far.

ALERT LIST:

ESCALATED

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

EXTREME

Bok Choy, Leeks, Napa Cabbage

WATCH LIST:

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



Strawberries – Lighter supplies due to recent cool temperatures. West Coast is now sole production area (Florida finished). Santa Maria's strong green fruit sets indicate significant production increase with piece-rate picking; peak expected mid-April to early May, lasting into June. Oxnard volume will steadily increase, peaking late April (favorable weather). Salinas/Watsonville forecasts increasing production. Consistent volume expected (no weather issues).



Blackberries – Strong quality (medium-large, good sheen, firm, mostly black). Monitor for red cell regression, attached calyx, soft/leaking fruit. Volume steady at peak, continuing through July. Organic volumes declining (early season end).



Raspberries – Overall volumes gradually increasing toward spring peak (late May/early June). Baja and California volumes trending up to peaks. Mexico volume stable next month, then gradual decline.



Blueberries – Light volumes (South America finished, Mexico primary source). Mexican production tapering off. Florida harvest slightly delayed by cool temperatures. Improved availability expected next week (Georgia starting, other domestic regions increasing).



Cucumbers – Slicer: Lighter supply crossing (Nogales, McAllen, Honduras). Short supply, especially selects/supers. Good quality, firmer markets (transition); better volume expected in two weeks. **English**: Good supply crossing (Mexico). Good quality on new Mexican crop. Persian harvesting in Baja is back to normal after cold, wet weather, with continued warmer, sunny days forecasted.



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



Potatoes – Market stable, carton production declining. Norkotahs phasing out in 3–4 weeks, shifting to Burbanks (production drop expected). Market increases anticipated with decreased production. Significant market strengthening possible with increased demand (uncertain). New season planting throughout April (similar acreage expected). Concern about similar depressed market next year if yields consistent.



Broccoli, Florets & Crowns – Broccoli/Crowns quality/supplies good; floret minis tight, florets/crowns tightening; watching heat/transition effects.



Tomatoes – Florida's round and Roma tomato production is peaking with excellent quality. East Coast snacking tomato supply is stable with excellent quality. Mexico's round tomato volume from Sonora and Sinaloa is steady (all sizes) with excellent quality. Ample Mexico Roma tomato supply from Sonora and Sinaloa crosses Nogales/McAllen with good quality. Mexico's snacking tomato supply is steady, but light demand is lowering FOB pricing; quality is good. Stable volume of Mexico's tomato on the vine is available this week. California tomatoes are expected to start in early June.



Broccolini/Sweet Baby Broccoli – Quality good, most growers good on supplies; watchlist for transition.



Chili Peppers – Baja chili harvest starts in a week. Obregon and Hermosillo are also producing. Sinaloa's chili season is ending with tight supplies. We've left Sinaloa but are in Sonora. Strong chili markets continue. Strong Mexican domestic demand allows growers to push prices up, typical for April's Easter season.



Avocados – Inventory rebounded to 59.4M pounds last week. Steady harvest continues, but most orchards will halt operations Thursday–Saturday for Holy Week. California, Peru, and Colombia are increasing volumes weekly. The Main Crop averages 34.5% dry matter, with 13.7M pounds harvested last week. Dry matter averages 26%, peaking on 48/60 sizes. California has significantly increased harvest for Cinco de Mayo, with strong production expected through July. The Traviesa Crop has begun shipping to the US and Europe; smaller sizes are present initially, but volumes will increase post-Easter. Colombia projects promotable volumes of medium/small fruit from mid-May into June.



Melons (Cantaloupe/Honeydew) – Stronger retail demand and vessel delays tightened the cantaloupe market, raising FOB pricing. Offshore cantaloupe program transitions to desert May 19th. Cantaloupe quality excellent (strong shelf life, high shell color, mostly 14–16% Brix), sizing shifting from mostly jumbo to more balanced 9–12ct by week's end. Honeydew production strong, peaking on 5s–5Js; 6ct very limited; some scarring, but overall quality solid (mostly 12–14% Brix).



Asparagus – Low volumes (Caborca/San Luis – weather, seasonal decline). Peru shipments started (arrivals two weeks ago); improved volume expected post-Easter. Michigan expected to start in May. Active markets (limited Mexico); firm until consistent Peru shipments.



Artichokes – Good quality and supply.



Corn – Excellent supply (Coachella/Brawley started), steady (Florida), Mexico almost done. Good domestic quality.



Parsley – Good supplies and quality.



Green, Red & Napa Cabbage – Napa Cabbage quality/supplies improving, some insect pressure. Green: Good supplies and quality. Red: Good quality, still light supplies with some growers; very active market.



Cauliflower – Supplies okay currently. Heat helped remaining Yuma crops, but potential changes with Salinas transition.



Fennel – Lower yields causing supply shortage; pricing escalated until supplies improve.



Kale – Supplies improved, good quality; watchlist due to potential insect pressure.



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



Onions – Market stable until Northwest fully out (expected May, some leftover possible). Texas starting with large crop. Southern California starts in ~4 weeks, also large crop. Limited optimism for April/May. June is uncertain (Texas, Northwest, SoCal mostly finished; New Mexico/Central California start). Market could improve or stay stagnant in June.



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



Lettuce, Iceberg & VA Blends – Lettuce supplies tightening due to transition. Potential quality/supply issues possible but currently good. Wilting/weak tips reported (heat), but overall quality good. Expect lighter weights/smaller heads from some growers until Salinas settles. **Iceberg VA:** Good quality/supplies currently, but potential issues during transition.



Lettuce, Romaine & VA Blends – Supplies good, but market trending higher (increased demand). Insect pressure/light blistering reported (warm weather). Organic Romaine hearts still escalated (limited supplies). **Romaine VA:** Good quality/supplies currently, but potential issues during transition.



Lettuce, Red & Green Leaf – Overall good quality/supplies, but potential issues during transition. Lighter weights/smaller sizes reported.



Leeks – Very tight supplies; some growers holding to averages; escalated market.



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



Pineapple – Pineapple supplies will remain constrained until late May. Flexibility in sizing is crucial for maintaining supply chain stability. Quality and taste remain positive.



Ginger – Steady supplies and market.



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



Celery – Good quality and supplies.



Brussel Sprouts – Quality/supplies an issue for most growers; significant industry drop; expect shortages, rising market. Growers trying to cover 10-week averages.



Lemons – Very good quality across California growing areas. Smaller sizes becoming lighter for 4-6 weeks; mid-to-large sizes readily available.



Limes – Lighter supplies this week (Holy Week), market higher. Smaller sizes (200s/230s/250s) peaking; large sizes limited. Strong market expected for at least a few weeks (post-Easter, pre-Cinco de Mayo demand). Good quality/condition.



Mandarins/Grapefruit/Specialties – Blood Oranges packing nearing end (small sizes). Cara Oranges finishing in about a month. California Mandarins/Grapefruit good supply, very good quality.



Oranges – Excellent quality. Small sizes (113s/138s) pricing strengthening due to heavier mid-size structure; allow lead time for small size orders.



Eggplant – Lighter domestic supply, mixed quality. Good supply, excellent quality (Mexico).



Watermelon – Supplies should slightly increase this week (more Mexico/Florida growers harvesting); smaller sizes remain tight (new fields mostly larger fruit); slow demand due to cooler weather; strong prices expected on 45s/60s, sluggish on 36s (rising volume).



Mushrooms – Promotable volume available, good quality.



Snow Peas & Sugar Snaps – Guatemalan production steady, potential quality issues (humidity). Mexican production stable, no major concerns.



Bananas – Imports remain light but will gradually improve with vessel arrivals. Cooler tropical weather and logistics impacted recent global supply. Minor pro-rates are possible this week. Overall quality is good despite the winter cycle. Monitor ripeness closely; warmer storage or wrapping may be needed due to faster inventory turnover.



Table Grapes – A stable supply of various colors and varieties is currently available. Mexico anticipates starting their season in 2 weeks.



Garlic – California Garlic very good quality, lighter supplies; good demand.



Green Beans – Very light supply (Mexico, Florida – season winding down) going into Easter. Varied quality expected from East (weather-impacted blocks). Quality/volume should improve in 2–3 weeks (Coachella/South Georgia transition).



Zucchini/Yellow Squash – Good volume and quality available from Mexico and Florida. Transition to South Georgia and California should start in 3 weeks.



Fresh Herbs – Eastern basil/mint quality impacted by Colombia rain; imported chervil supply down (Ecuador weather). West Coast basil supply/quality slowly improving; continued improvement expected with stable weather. Arugula/Cilantro limited (frost damage: small/uneven bunches, purple stems, mechanical issues); some growers prorating.



Chayote Squash – Availability in Veracruz, Mexico, continues to fluctuate with typical spring weather. Rain helps volume, while very hot weather hurts plants. This volatility is expected in Veracruz, the best growing area. A brief freeze occurred last weekend.



Cactus Pads/Diced – Have better volumes, with good weather continuing. Active markets are expected through April in Mexico and the U.S. due to the Easter season.