

OVERVIEW:

South Florida continues strong, quality production across multiple items, similar to Nogales and McAllen. Tomato volume is stable with ongoing harvests in Florida and Mexico (Sonora/Baja), both reporting outstanding quality. California anticipates its tomato start in early June. Lighter supplies: Green Beans, premium Green Bells, Pickles, Shishitos, Habanero, Caribe Peppers. Western mixed vegetable transition begins, with initial Coachella pepper, corn, and bean harvests expected next week. Offshore table grape quality/supply stable; Mexico forecast to start in about two weeks. Offshore melon volume decreasing; desert fruit transition in 3–4 weeks. Banana/pineapple availability limited; pineapple size flexibility requested. US avocado market down 12% last week (52.4M lbs). Smaller fruit dominates availability, limited large sizes (48+). High Grade 2 percentage continues, expected to increase. Main Crop dry matter 35.1%. Mexico's Holy Week impacted harvest, lowering weekly volumes, but activity improved mid-week. Mexico Labor Day (May 1st) no harvest. However, California's full capacity and expected doubling of Peruvian volume unlikely to impact the industry. California week 16 harvest ~15.9M lbs, peaking on sizes 48/60 (26% avg. dry matter).

Harvest ramping up for Cinco de Mayo, strong volumes expected through July. Traviesa avocado crop underway (US/Europe), promising volumes/promotional supply on medium/small sizes anticipated during peak weeks. Salinas transition ending; all growers moved/settling. Despite initial challenges, smooth transition. Salinas weather good, but rain/warmer temperatures forecast, potentially increasing insect pressure. Salinas lettuce quality/supplies improving after some lighter weights/smaller heads. Brussel sprout supplies significantly down industry-wide, expected light for at least two weeks, some May relief anticipated. Endive, Escarole, Fennel, Parsley remain escalated due to supply shortages. Bok Choy, Napa, Leeks remain at extreme trigger levels. Overall, Salinas production steady with a positive start.

ALERT LIST:

ESCALATED

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

EXTREME

Bok Choy, Leeks, Napa Cabbage

WATCH LIST:

Banana, Pineapple, Arugula, Broccoli, Broccolini, Brussel Sprouts, Green & Red Cabbage, Cauliflower, Cilantro, Iceberg & Romaine Lettuce, Red & Green Leaf Lettuce, Ginger, Snow Peas, Sugar Snap Peas, Spinach, Yellow Squash, Eggplant, Oranges & Lemons (Small)



Strawberries – Light supplies persist due to cool temperatures, increasing fruit size. Strong green fruit sets in Santa Maria anticipate significant production ramp-up with piece-rate picking, reaching peak mid-to-late April/early May, extending into June for later blocks. Oxnard volume building steadily with favorable weather, expecting a brief late-April peak before rapid decline as transition to Salinas/Watsonville begins. Salinas/Watsonville production to gradually increase. Consistent volumes anticipated with no disruptive weather.



Blackberries – Strong quality (medium-large, good sheen, firm, mostly black fruit) but some red cell regression, attached calyx, and soft/leaking fruit reported. Consistent peak volume expected through July. Organic volumes declining as season ends early.



Raspberries – Overall volumes gradually increasing towards late May/early June spring peak. Baja and California trending upward to seasonal peaks. Mexico stable for next month, then gradual decline.



Blueberries – Overall volume remains below expectations, though past seasonal low. Meaningful improvement not expected until mid-to-late May. Mexican volume declining faster than anticipated. Florida short due to quality issues. Georgia season delayed, first light harvest reported with modest increase expected end of week and further growth next week. Central Valley production also behind schedule, light harvest expected next week.



Cucumbers – Slicer: Lighter Nogales/McAllen/Honduras supply, especially selects/supers. Good quality. Firmer markets due to transition; better volume expected in two weeks. South Georgia start around May 10th. English: Good Mexican supply this week, good quality on new crop.



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



Potatoes – Stable, but carton production declining. Norkotahs phasing out in 3–4 weeks, shifting to Burbanks and reducing production. Anticipate some market increases with lower production. Significant market strengthening possible if demand rises, but uncertain. Planting for next season throughout April, acreage similar to current year. Concern about continued depressed market next year if yields remain consistent.



Broccoli, Florets & Crowns – Steady quality and supplies.



Tomatoes – Florida is peaking on Round and Roma tomato production with outstanding quality, and a stable supply of Cherry, Grape, and Medley snacking tomatoes also boasts outstanding quality. Mexico's Sonora and Sinaloa regions have a steady volume of Round tomatoes (all sizes) with outstanding quality, while Roma tomatoes from the same regions crossing through Nogales and McAllen offer ample supply and good quality. Mexico also reports a steady supply of Cherry, Grape, and Medley snacking tomatoes, though light demand has lowered FOB pricing; quality remains good. Tomato on the Vine volume from Mexico is stable this week. California's tomato season is forecasted to start in early June.



Broccolini/Sweet Baby Broccoli – Good quality and supplies expected.



Chili Peppers – Mexican supplies: generally good, quality mixed. Sonora harvest in coming weeks will boost supply and quality. Good this week: Jalapeño, Poblano. Lower this week: Caribe, Habanero, Shishito. California production: early June. South Georgia: by May's second week.



Avocados – U.S. market down 12% to 52.4M pounds. Smaller fruit prevalent, limited large sizes (48+). Increasing Grade 2 reports. Main Crop dry matter: 35.1%. Mexico's Holy Week pause cut volume; Labor Day (May 1st) will also halt harvest, but California and Peru's increased supply should offset. California harvested 15.9M pounds (week 16), peaking on sizes 48/60 (26% dry matter), with strong volumes expected through July due to Cinco de Mayo.



Melons (Cantaloupe/Honeydew) – Tight cantaloupe market due to high demand/vessel delays; firm FOB. Cantaloupe desert transition May 19th, smaller fruit expected. Excellent cantaloupe quality/shelf life, high color, Brix 14–16%, mostly 5–9s (limited 12s/15s). Honeydew production down, mostly 5s–5Js (very limited 6ct). Some honeydew scarring, solid quality, Brix 12–14%.



Asparagus – Low Caborca/San Luis volumes due to heat/seasonal decline; Peruvian volume increasing. Reduced market activity post-Easter.



Artichokes – Good quality and supply.



Corn – Excellent Coachella/Brawley supply starting, steady Florida volume. Mexico nearly done. Good domestic quality.



Parsley – Good supplies and quality.



Green, Red & Napa Cabbage – Green: Good supplies and quality. Napa: Improving quality and supplies, but some insect pressure. Napa: Improving quality and supplies, but some insect pressure. Red: Good quality, but still light supplies with some growers. Very active market.



Cauliflower – Steady quality and supplies.



Fennel – Lower yields causing supply shortage. Escalated pricing until supply improves.



Kale – Improved supplies and good quality, but watchlist due to potential insect pressure.



Bell Peppers – Nogales has short green bell supply, especially large sizes; good color bell supply with mostly good quality. Coachella scratching green bells this week. South Florida has pricier premium green bells, plentiful choice; good color bell supply. South Georgia green bell transition around May 10th; yellow/red color bells expected mid-May. Canada's limited HH color bells increasing.



Onions – Market expected to remain stable until Northwest supply fully clears (anticipated May). Texas crop just starting, expected to be large. Southern California starts in ~4 weeks, also expecting high volume. Limited optimism for April/May. June is uncertain, with Texas, Northwest, and most of Southern California done, shifting focus to New Mexico and Central California, offering potential for market improvement.



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



Lettuce, Iceberg & VA Blends – Supplies are good, though some growers may still have lighter weights and smaller heads until Salinas fully transitions. Overall quality is good. **Iceberg VA:** Good quality and supplies.



Lettuce, Romaine & VA Blends – Good supplies, but market trending higher due to increased demand. Warmer weather causing insect pressure and light blistering. Organic Romaine hearts are no longer escalated. **VA:** Good quality and supplies.



Lettuce, Red & Green Leaf – Overall good quality and supplies. Weights and sizing are improving.



Leeks – Very tight supply, some growers holding to averages. Escalated market.



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



Pineapple – Pineapple supplies will remain tight with no improvement anticipated until late May. Size flexibility is recommended to ensure supply chain stability. Overall quality and taste are good.



Ginger – Steady supply and market.



Carrots – Desert regions starting with good supplies & very good quality. Steady supplies expected through late April/early May.



Celery – Good quality and supplies.



Brussel Sprouts – Quality and supply issues for most growers; significant industry drop. Expect shortages and rising market. Growers covering 10-week averages.



Lemons – Very good quality across California. Small sizes (165s and smaller) extremely limited for 4–6 weeks; larger sizes (140s and larger) readily available. Market stronger on small sizes. Ample lead time needed, especially for small sizes, with many shippers holding to averages.



Limes – Supplies remain low this week and into next, as shippers recover from Holy Week. Tight overall supply and increased Cinco de Mayo demand will likely push market higher. Smaller sizes (200s, 230s, 250s) peaking, larger sizes limited. Strong market expected for at least the next few weeks, especially pre-Cinco de Mayo.



Mandarins/Grapefruit/Specialties – Blood Oranges packing, finishing mid-to-late May (small sizes). Cara Caras available, finishing mid-to-late May. CA Mandarins good supply and quality. California Grapefruit light Fancy grade supply, Choice grade available.



Oranges – Excellent quality and eating. Prices for 88s and smaller (especially 113s/138s) rising due to shift to larger sizes. Ample order lead time needed, particularly for small sizes as many shippers hold to averages.



Eggplant – Lighter domestic supply, mixed quality. Good Mexican supply and excellent quality. South Georgia and California start around third week of May.



Watermelon – Lighter supply, strong Mexico/Florida demand. Small sizes tight, larger fruit prevalent in new fields. Strong bin/carton prices expected. Some 11ct mini deals.



Mushrooms – Promotable volume available, good quality.



Snow Peas & Sugar Snaps – Stable Guatemalan production, but potential quality issues due to humidity. Steady Mexican production of both.



Bananas – Low import volumes expected to improve slowly with vessel arrivals. Tropical weather/logistics impacted supply. Minor pro-rates possible, decreasing this week. Good quality despite winter cycle. Fast port/ripening center turnover due to low inventory may affect color; monitor ripeness, consider warmer storage.



Table Grapes – A stable supply of various colors and varieties is currently available. Mexico's season is expected to commence in two weeks.



Garlic – Very good California quality with lighter supplies. Good demand.



Green Beans –Very light post-Easter supply from Mexico/Florida as seasons end. Variable East Coast quality due to earlier weather impacts. Quality/volume should improve in 2–3 weeks with Coachella/South Georgia transition.



Zucchini/Yellow Squash – Good volume/quality from Mexico and Florida. Georgia ramping up early next week, California a few weeks out.



Fresh Herbs – East Coast basil/mint quality impacted by Colombia rain; imported chervil down due to Ecuador weather. West Coast basil supply/quality slowly improving. Limited arugula/cilantro due to frost (small/uneven bunches, purple stems, mechanical issues), some proring.