

OVERVIEW:

South Florida's robust production continues, mirroring conditions in Nogales and McAllen, with improving tomato markets due to spring harvests, though mid-sized tomatoes are temporarily short. Sonora and Sinaloa also report excellent quality. Limited supplies persist for yellow squash, premium green bells, pickles, shishitos, red fresnos, and caribe peppers. Western mixed vegetable transitions begin in Coachella with early pepper, corn, and bean harvests. Offshore table grapes and melons remain stable; bananas and pineapples are limited, requiring size flexibility. Avocado imports have drastically reduced due to tariff uncertainties, tightening supply and driving price increases. Small and medium-sized avocados are in high demand, further impacted by Mexican domestic consumption. April's avocado market will be volatile, influenced by tariffs and holiday demand, with relief expected in May/June from increased Colombian and Peruvian volumes.

California avocado production is at full capacity, increasing availability mid-April. Mexico's asparagus season ends, causing supply shortages and quality issues; Peru increases production, reaching full capacity late April. Growers transition from Yuma to Huron, Oxnard, and Salinas, with Salinas production increasing next week. Yuma's heat wave stressed crops, causing insect pressure and quality concerns, though a cooling trend provides relief. Salinas weather is favorable. Expect transition-related supply and quality fluctuations. Lettuce supplies are tightening, with rising market prices. Spinach was minimally affected by heat. Endive, escarole, cilantro, parsley, and spinach remain elevated due to shortages. Bok choy, fennel, napa, and leeks are critically low, and red cabbage remains elevated. Insect pressure persists in Yuma, potentially causing quality issues.

ALERT LIST:

ESCALATED

Asparagus, Avocados, Red Cabbage, Endive, Escarole, Fresh Herbs, Caribe, Habanero, Shishito Peppers, Limes, Italian & Curly Parsley, Organic Romaine Hearts, Spinach

EXTREME

Bok Choy, Fennel, Anise, Leeks, Napa Cabbage

WATCH LIST:

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



Strawberries – Mexico's season ends, Florida finishes within a week. Western volumes limited. Santa Maria recovers from rain, rebounding mid-April, peaking mid-April to early May. Organic culling high. Oxnard recovery in two weeks, peaking late April. Salinas/Watsonville rain delays early season; packing begins mid-late April. Florida quality varies, rain caused minor issues, heat accelerates ripening. Production declines.



Blackberries – Strong quality, some red cell regression, calyx, and soft fruit issues. Volume steady through July. Organic volume declining.



Raspberries – Strong quality, some overripe fruit removed. Volume steady through April. Organic production strong through March.



Blueberries – Mexico's hot weather yields peak conventional volume through mid-April, declining into May. Organic season ended; supply gap till August. Pruning may reduce short-term volume. Quality excellent, minor defects reported. Chile's heat/rain ended season early; final shipments show softness. Weather warming; rain slowed, but region rebounds with peak organic production through April. Florida conventional production underway, quality good, Jumbos available. Cool weather/rain delayed harvest; peak now expected in April, decline in May.



Cucumbers – Slicer: Supply light Nogales/McAllen/Honduras, selects/supers short. Quality good, markets firm. Volume improves in two weeks. English: Good supply Mexico, quality good. Persian: Cold/wet in Baja gone, harvesting normal. Warmer days expected this weekend, sunny forecast.



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



Potatoes – Market stable, carton production down. Norkotahs end in 3–4 weeks, shifting to Burbanks, reducing production. Market increases likely. Demand increase could strengthen market (uncertain). April planting, similar acreage expected. Concerns about continued depressed market next year with consistent yields.



Broccoli, Florets & Crowns – Good quality/supplies. Floret minis tight, florets/crowns tightening. Potential supply/quality issues, heat monitored.



Tomatoes – East Coast: Round tomatoes more available (new fields), mid-sizes short, quality great, good volume expected. Roma volume improving (new blocks), good quality. Snacking tomatoes (cherry, grape, medley) more supply, less demand, lower prices, good quality. **Mexico:** Large round tomatoes more volume (Sonora/Sinaloa), mid-sizes short next 10 days; market stabilizing, excellent quality. Ample Roma (Sonora/Sinaloa via Nogales/McAllen), good quality. Snacking tomatoes (cherry, grape, medley) more supply, less demand, lower prices, good quality. Tomato on vine stable.



Broccolini/Sweet Baby Broccoli – Good quality, good supplies. Transition monitored.



Chili Peppers – Sinaloa tightening (tired fields, quality checks). Sonora/Baja inconsistent. Strong market. Some zones empty, others starting. Active Mexico market drives high grower prices (Easter effect). Anaheim, Yellow, Serrano spiking.



Avocados – Volume peaked last week at 76.8M pounds, near Super Bowl levels. Industry built US inventories pre-tariffs, creating a supply buffer. Next week's Mexico projections are 52M pounds, but current harvest rates suggest 30M pounds is more realistic. Small and medium fruit demand remains high, with prices converging. Mexican domestic market absorbs significant small fruit volume due to Lent and Easter. Mexico's Main Crop dry matter is 34.5%. California harvests increased to 11.2M pounds in week 13, with 25% dry matter and peak sizing at 48s and 60s. Full California harvest expected mid-April.



Melons (Cantaloupe/Honeydew) – Cantaloupes: Optimum quality, high color. Sizing peaks at regular 9s, then jumbos, then 12s. Good size range available. Brix 13–15%, excellent flavor. Honeydew: Honduras production peaked, rapid drop in arrivals within seven days. Sizing peaks at 5/6s, covering all orders. Older stored fruit being rotated out. Increased numbers expected by Friday. Brix 12–14%.



Asparagus – Caborca/San Luis volume low due to weather. Markets active, Mexico volume down. Peruvian arrivals late week. Limited supplies, high markets expected.



Artichokes – Good supply/quality.



Corn – Florida/Mexico supply light, winter crops ending. Markets firm, quality good. Coachella new crop in two weeks.



Parsley – Good supply/quality.



Green, Red & Napa Cabbage – Green: Good supply/quality. Napa: Improving quality/supplies, insect pressure. Red: High prices in some markets. Good quality, light supplies.



Cauliflower – Supplies okay, Salinas transition monitored.



Fennel – Low yields, supply shortage. Prices high until supply improves.



Kale – Improved supplies, good quality. Insect pressure monitored.



Bell Peppers – Green: Supply light in Nogales/Florida. Markets high, quality mixed. Large sizes limited, medium/choice stable. Coachella availability in two weeks. Colored: Good supply Nogales/Florida. Quality good. Canada's HH bells increase. Desert La Rouge yellows/reds mid-May.



Onions – Market stable until Northwest खत्म (finishes) in May, some leftover product possible. Texas crop large, Southern California starts in 4 weeks with large volume. Limited optimism for April/May. June uncertain; Texas, Northwest, SoCal mostly done, leaving New Mexico/Central California for a fresh start, market could improve or stay stagnant.



Bok Choy – Good quality, limited supplies. Market high.



Lettuce, Iceberg & VA Blends – Supplies tightening with transition. Market flux, potential quality/supply issues. Heat caused wilting/weak tips. Iceberg VA: Quality/supplies good, potential transition issues.



Lettuce, Romaine & VA Blends – Supplies good, market rising due to demand. Insect pressure reported due to heat. Organic hearts escalated, limited supply. Romaine VA: Quality/supplies good, potential transition issues.



Lettuce, Red & Green Leaf – Quality/supplies good, potential transition issues.



Leeks – Very tight supply, growers holding averages. Market high.



Spinach – Good supply/quality. Weak texture, discoloration, wilting, insect damage reported.



Pineapple – Supplies remain tight, with improvement expected in May. Size flexibility is crucial for supply chain stability. Quality and taste are good.



Ginger – Steady supply/market.



Carrots – Desert regions good supply/quality, steady supplies through late April/early May.



Celery – Good quality/supplies.



Brussel Sprouts – Good quality/supplies.



Lemons – Good supply, high quality. Small sizes limited, large sizes available.



Limes – Demand steady, small sizes peak (200s, 230s, 250s), large sizes limited. Quality improved, market stable.



Mandarins/Grapefruit/Specialties – Blood oranges ending, small sizes. Caras finish in a month. California mandarins and grapefruit good supply, excellent quality.



Oranges – Excellent quality. Small size pricing strengthens, market stable. Rain slowed harvest, supplies continue.



Eggplant – Domestic supply light, quality mixed. Mexico good supply/quality.



Watermelon – Supply slightly increases with more Mexico/Florida harvests. Small sizes remain tight, larger fruit produced. Demand slow due to cool weather. 45s/60s prices strong, 36s sluggish with rising volume.



Mushrooms – Promotable volume, good quality.



Snow Peas & Sugar Snaps – Guatemala steady production, potential quality issues due to high humidity. Mexico stable production, no major concerns.



Bananas – Imports low, improving with vessel arrivals. Tropical issues impacted supply. Minor prorates possible. Monitor ripeness due to rapid port turnover.



Table Grapes – Stable supply of colors and varieties. Mexico begins in four weeks.



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



Green Beans – Excellent supply, quality varied due to weather. Stable volume Nogales/Florida.



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



Fresh Herbs – Basil supply/quality marginal due to cold/rain. Tarragon/other herbs affected. Supply improves in 7–10 days, weather permitting. Arugula/cilantro limited due to frost, uneven bunches, purple stems, mechanical issues. Prorating implemented.



Chayote Squash – Veracruz (Mexico) warmer (80–90s), sporadic rain good for plants, increasing volume. Continued heat could harm plants (typical). Veracruz best area, volatile weather.



Cactus Pads/Diced – Better volumes, good weather. Active Easter markets expected through March/April.