

OVERVIEW:

Strong, high-quality South Florida production continues across multiple commodities. Slightly lighter volumes in Nogales/McAllen. Increasing mixed veg transitions as California/South Georgia summer harvests begin. Good volume/quality Coachella Corn/Green Bells. Baja Slicer Cucumber harvest starts late next week. Decreasing Winter Tomato volume lifts Roma/Round markets, no supply issues expected. Strong Tomato quality reported from Florida/Mexico (new Sonora/Baja/Jalisco crops). California/South Georgia Tomatoes expected early June. Lighter supplies: Green Beans, premium Green Bells, Pickles, Shishitos, Habaneros. Stable offshore table grape quality/supply; Mexico starts soon. Decreasing offshore melon volume transitions to desert fruit in 2 weeks. Limited Banana/Pineapple availability; request Pineapple size flexibility. Panama strike will cause volatile Banana supply, major shortages unlikely. New California Yellow/White Peaches, Cherries, Apricots available; Georgia/South Carolina also have Peaches, volumes increasing. Plums in a few weeks. Underwhelming Cinco Avocado demand caused downward pricing as increased volumes dilute Mexico's dominance. California peaks 48s, Colombia 70s, Peru larger fruit, impacting Mexico's key 60-count size. Mexico's market share dropped, will decline as Peruvian volumes increase, peaking July. Stable avocado inventories. Softening post-Cinco demand may increase short-term border availability and ease select prices, but overall market stability expected with Memorial Day demand. High Grade 2 Mexican avocados reported, typical late season. Steady California avocado harvests with good conditions/quality. Peruvian avocado season underway across sizes, ramping up for summer promotions. Salinas in full production; growers managed transition well. Favorable spring weather, though rain next week may increase insect pressure. Good Lettuce supplies/weights. Good Leafy Greens/Broccoli/Cauliflower. Light Brussels Sprouts supplies/quality issues; limited jumbos, mostly small/medium. Elevated market. Escalated Endive/Escarole/Fennel/Leeks/Parsley markets due to shortages. Extreme trigger levels for Bok Choy/Napa. Steady overall Salinas production, anticipating strong season.

ALERT LIST:

ESCALATED

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

EXTREME

Bok Choy, Brussel Sprouts, Organic Celery, Lime (Large)

WATCH LIST:

Asparagus, Pineapple, Red Cabbage, Celery, Cilantro, Pineapple, Ginger, Green Onions, Snow Peas & Sugar Snap Peas, Spinach, Yellow Squash, Eggplant, Oranges & Lemons (both small)



Strawberries – Improved weather boosts volumes. Santa Maria: cool/overcast with rain, minimal impact. Strong quality despite minor tip issues; warming temps increase production soon, peak mid-May. Organic increasing, peak mid-May-early June. Watsonville/Salinas: colder, improving next week. Quality improving, large fruit (10-16 count). Cold preserved quality, some bruising/dry calyxes. Organic slightly smaller but strong quality, increasing to June peak. All sizes available: strong volume/sizing/quality.



Blackberries – Hot Mexico weather (80s-90s/50s) pre-June rains. Good quality: medium-large, sheen, mostly black, firm. Heat causes some issues. Volume dip through early May, peak late May-June. Mexico organic resumes early May, increasing later. Watsonville conventional mid-May, organic June.



Raspberries – Hot Mexico (80s-90s/50s) pre-June rains. Strong quality: red, firm, mostly medium. Some heat-related issues, crews removing. Volume dip now, increasing through May, brief slowdown late May-June, then increases July-August. Mexico organic resumes next week. Watsonville conventional starts July, no organic this season.



Blueberries – Supplies increase significantly next week. Mexico: hot (80s-90s/50s), conventional declining (ends July), organic resumes August. Sizing 12-16mm, good quality, some heat issues. Oxnard: cool/overcast, warmer next week, organic past peak, declining until late May (excellent quality). Florida: hot (80s/60s), conventional peak but volumes down (excellent quality). Georgia: warm (70s-80s/50s), conventional peak soon, yields down (season ends early June). Limited open market. Central Valley: hot/sunny (80s/upper 50s), accelerating organic/conventional. Organic ramping up, peak soon through mid-June. Initial conventional good, peak late May. Limited open market. OR/WA/BC around July.



Cucumbers – Slicer: Lighter Nogales/McAllen/Florida supply, very light supers/plains. Good quality, firmer markets due to transition; better volume in two weeks. South Georgia starts May 10th. English: Good supply crossing from Mexico, good quality on new crop. Persian: Persian cucumber production continues with warm, sunny weather expected.



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



Potatoes – Market stable, carton production declining. Norkotahs out in 3–4 weeks, shifting to Burbanks, reducing production. Expect some market increases. Significant increase possible with demand, uncertain. Similar acreage planting in April. Concern about similar supply/market next year if yields consistent.



Broccoli, Florets & Crowns – Good quality/supply.



Tomatoes – Florida round and Roma tomato production peaked and will decline, with outstanding quality and higher spot market prices. Snacking tomato supply is stable with excellent quality. Lighter Mexican round and Roma volumes and higher East Coast demand increased markets, especially for large sizes. Transitioning to summer regions should stabilize markets; new crop quality is excellent, but remaining winter crop quality is questionable. Roma and snacking tomato supply is steady with light demand lowering FOB prices, though quality is good. Tomato on the vine volume is stable. California and Georgia production expected in early June.



Broccolini/Sweet Baby Broccoli – Good quality/supply.



Chili Peppers – Supply from Baja and Mexicali is insufficient to meet market demand. Some chili peppers from Southeast crossing through Nogales have suspect quality due to late-season harvests.



Avocados – Most avocado prices declined, except stable 84s. Last week's U.S. volume increased 21% to 63.6M pounds, sufficient for Cinco de Mayo despite lower projections. Mexican harvest pause won't disrupt supply due to other origins. California harvest (~15M pounds, peaking 48s/60s) is in full swing with steady summer volumes expected. Peru's season ramping up global shipments, U.S. arrivals expected late May/early June with strong sizing/quality for summer promotions. Promising Traviesa crop volumes (especially medium/small) for promotions.



Melons (Cantaloupe/Honeydew) – Cantaloupe quality excellent, strong shelf life, high shell color. Brix mostly 14–16%. Sizing shifting to more 9s/12s (cantaloupe), limited 15s. Honeydew production dropping this week, sizing strong on 5s–5Js; 6ct very limited. Some scars on honeydew, but overall quality solid. Honeydew Brix mostly 12–14%. Possible more Mexican honeydew available.



Asparagus – Improved supplies (Peru), full Peru transition mid-May. Washington domestic started, Michigan mid-month. Market pricing trending down, strong quality. White asparagus (Peru) declining due to season/transitions.



Artichokes – Good quality/supply.



Corn – Excellent Coachella/Brawley start, steady Florida volume, Georgia coming. Mexico done. Domestic quality good.



Parsley – Good supply/quality.



Green, Red & Napa Cabbage – Green: Good supply/quality. Napa: Quality/supplies improving, some insect pressure. Red: Good quality, light supply with some growers. Market very active.



Cauliflower – Good quality/supply.



Fennel – Lower yields causing supply shortage. Pricing escalated until supply improves.



Kale – Improved supply, good quality.



Bell Peppers – Nogales short on large Greens. Coachella full Green production, good supply all sizes, large premium. South Florida high Green prices on premium, plentiful choice; transition to South Georgia around May 10th. Good Color supply in Nogales and South Florida, mostly good quality. Canada starting limited HH Bells, increasing over weeks. La Rouge yellows/reds expected from desert/South Georgia by mid-May.



Onions – Stable market until Northwest clears (around May). Large Texas crop starting. Southern California starts in ~4 weeks, also large. Limited optimism for April/May. June uncertain: Texas, Northwest, most of Southern Cal done; New Mexico/Central California remain. Market could improve or stay flat.



Bok Choy – Good quality, limited supply driving market.



Lettuce, Iceberg & VA Blends – Good supply, good quality. Iceberg VA: Good supply, good quality.



Lettuce, Romaine & VA Blends – Good supply, good quality, some fringe burn/light cupping reported. Monitor for spring insect pressure. Romaine VA: Good supply, good quality.



Lettuce, Red & Green Leaf – Good supply, good quality.



Leeks – Very tight supply, some growers holding averages. Market escalated.



Spinach – Good supply/quality. Some minor reports of weak texture, discoloration, wilting, and insect damage.



Pineapple – Supply will remain tight with no improvement expected until late May. Size flexibility is suggested for supply chain stability. Overall quality and taste are good.



Ginger – Steady supply/market.



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



Celery – Good quality, light supply with some growers. Organic market increased.



Brussel Sprouts – Ongoing quality/supply issues. Growers covering averages. Seeder/sizing lean medium/small. Jumbos very limited. Market extreme.



Lemons – Continued very good quality from all California areas. Small sizes (165s and smaller) very limited for 4–6 weeks; larger sizes (140s+) available. Stronger market for smalls. Allow ample order lead time, especially for smalls.



Limes – (96° highs/79° lows) are accelerating maturation, causing a prevalence of smaller limes (200s/230s/250s) and extreme shortages of large sizes (110s/150s/175s). Market remains elevated, is expected to stay elevated for weeks, w/ quality concerns.



Mandarins/Grapefruit/Specialties – Blood Oranges finishing this month, sizing small. Cara Caras also finishing this month. California Mandarins: good supply, very good quality. California Grapefruit: light Fancy, Choice available.



Oranges – Very good quality/demand. Prices rising for 88s and smaller (especially 113s/138s) as sizes trend larger. Allow ample order lead time, especially for smalls. Navels finish early–mid June; Valencias start mid–June, projected lower volume with smaller early fruit.



Eggplant – Lighter domestic supply, mixed quality. Good supply/excellent quality Mexico. South Georgia/California start May 3rd week.



Watermelon – Lighter supplies, strong demand from Mexico/Florida. Smaller sizes remain tight; new fields mostly larger fruit. Prices expected to stay strong on bins/cartons. Some deals on 11ct minis.



Mushrooms – Promotable volume, good quality.



Snow Peas & Sugar Snaps – Low Guatemala snow pea volume (weather), declining sugar snap supplies (same reason). Limited volumes expected 2–3 weeks. Peru anticipated to start both within that timeframe. Steady Mexico production of both.



Bananas – Very light banana imports expected for four weeks due to high demand, lighter tropical supply, and Panama strike–related logistical issues potentially causing pro–rates. Good and improving banana quality. Light inventories mean faster port/ripening turns; some fruit may not reach optimal color on arrival. Closely monitor ripeness and consider holding more inventory to manage color and prevent shorts.



Table Grapes – Stable supply available across colors and varieties. Mexico expected to start within the next 7-10 days.



Garlic – California: very good quality, lighter supply. Good demand.



Green Beans – Very light post-Easter supply Mexico/Florida as seasons end. Varied East quality from weather-impacted blocks. Quality/volume should improve in 2-3 weeks with Coachella/South Georgia transition.



Zucchini/Yellow Squash – Good volume/quality all shipping points on Florida Italians/Yellows; South Georgia production starting, ramping up with good quality. Nogales volume winding down, transitioning to California/Baja.



Fresh Herbs – East basil quality challenged by Colombia rain, slow improvement. Limited imported chervil (Ecuador weather). West supply/quality steady, slow improvement. Both should improve with better weather.



Chayote Squash – Chayote squash availability fluctuates due to typical spring weather in Veracruz, Mexico. Rain improves volume, while hot weather hinders plants. Lower volumes occurred last week and this week due to reduced quality.



Cactus Pads/Diced – Cactus pad/diced bag volumes are better with continued good weather. May is a good time for promotions following a successful Easter season.