

OVERVIEW:

South Florida's season is ending, with many items transitioning to South Georgia. In Nogales and McAllen, tomato transitions are well underway as Sinaloa wraps up, moving to Sonora, Jalisco, and Baja. Mexican new crop quality is strong, but Florida may face rain issues. Expect California, South Carolina, and South Georgia to start tomatoes in early June. Mixed vegetables are also shifting to California and South Georgia. Coachella has good corn and green bell production with excellent quality. New crop slicer cucumbers are increasing from Georgia and Baja. Limited items include premium green bells, pickles, shishito peppers, tomatillos, and habaneros. Offshore table grape supply and quality are stable for reds, but greens are tight. Mexico is starting to cross fruit. Offshore melon volume will decrease as the season ends, with desert fruit transitions starting. Banana and pineapple availability remains limited; flexibility on pineapple sizes is requested. Banana supply will be volatile due to a Panama labor strike, though no major shortages are expected. New crop peaches (yellow/white), cherries, and apricots are available from California, with peaches also from Georgia and South Carolina. Volume will increase. Plums are still a few weeks out. The avocado market is stable with healthy supply and steady demand. Mexican imports are declining, with remaining fruit staying domestic. California production is consistent with excellent quality. Peruvian arrivals are increasing, supporting summer programs and strong demand. U.S. avocado volume should remain stable through June, with Peruvian shipments expected to double, likely causing downward pricing pressure. Mexico's next crop (Loca) may shift the market due to lower dry matter, leading to longer ripening. While July 1st is the official Loca start, recent delays make the exact date uncertain. Salinas weather will be cooler than normal next week, with no rain. This may impact growth, but supplies and quality are currently good. Insect pressure has been minimal. Lettuce supplies and quality are changing for some growers due to Sclerotinia and INSV, causing decreased supplies and a potential market firm-up. Broccoli and cauliflower supplies are slightly down due to cooler weather and are on a watchlist. Broccolini is tight, with increased market prices. Spinach quality and supplies are just okay. Brussel sprouts remain light, with quality improving. Jumbos are limited. Bok Choy, Napa, Endive, Escarole, Fennel, and Leeks remain escalated due to shortages. Overall, Salinas production is steady.

ALERT LIST:

ESCALATED

Avocados, Bananas, Bok Choy, Organic Celery, Endive, Escarole, Fennel, Anise, Hot Peppers (Caribe, Habanero, Shishito), Leeks, Limes (Small), Napa Cabbage

EXTREME

Limes (Large)

WATCH LIST:

Asparagus, Broccoli, Broccolini, Cauliflower, Celery, Cilantro, Fresh Herbs, VA Iceberg Lettuce, Lemons (Small), Oranges (Small), Pineapple, Ginger, Green Onions, Romaine Lettuce & Hearts, Snow Peas & Sugar Snap Peas, Spinach, Table Grapes



Strawberries – Volumes improving with favorable weather. Santa Maria: Strong quality, increasing production. Peak production passed, will taper. Organic volumes building, peak expected soon for strong late-June supply. Watsonville/Salinas: Cooler, dry weather, excellent quality. Some bruising/dry calyx noted. Organic fruit smaller but good. Production increasing, peak in June. All pack sizes available, strong volume, size, quality.



Blackberries – Mexico: Hot weather, temperature swings. Quality strong: good size, sheen, color, firm. Heat causes red cell regression, attached calyx, soft/leaking fruit. Volume steady but dipping through early May. Peak volumes late May-June. Organic production resumes early May, limited volume. Watsonville: Minimal conventional production started.



Raspberries – Mexico: Hot weather, wide temperature swings. Quality strong: good color, firm, medium size. Some overripe/crumbled fruit due to heat. Volume dipping, steady increases through May, brief slowdown late May-June, rebound July-August. Organic production resumes next week. Watsonville: Conventional production July; no organic.



Blueberries – Mexico: Hot weather. Conventional volume declining weekly, ends July. Organic August. Quality good, some heat issues. Oxnard: Organic past peak, declining until late May. Excellent quality. Florida: At peak, declining, 30-50% below forecast due to prior weather. Excellent quality. Other regions: Reduced yields due to weather, limited open market. Central Valley: Hot weather accelerating production. Organic volumes peak through mid-June. Conventional harvests started, excellent quality, peak late May. Limited open market. Production starts July, transitions to summer.



Cucumbers – Slicer: Stable supply from Otay, Nogales, and McAllen. Florida is done, with full transition to South Georgia. Quality is very good across all shipping points. English: Good supply from Mexico with good quality on new crop. Persian: Good supplies due to warm, sunny weather.



Green Onions – Supplies and quality are good, though some initial reports indicate light supply.



Potatoes – Market stable, but carton production declining. Norkotahs phasing out (3–4 weeks), shifting to Burbanks, which will reduce production and likely increase prices. Demand increase could strengthen market. Planting in April, similar acreage expected; concern about next season's market if yields remain consistent.



Broccoli, Florets & Crowns – Quality and supplies are good for most suppliers, but some growers report light supplies.



Tomatoes – East Coast Round and Roma volume is light and decreasing, transitioning to Bainbridge and South Carolina (Tennessee by mid-June); expect potential volatility and mixed quality. East Coast snacking tomato supply is lighter due to rain but quality is good. Mexico has abundant new crop Round tomatoes from Jalisco, Baja, and Central Mexico; markets are firm with strong demand for larger fruit, and outstanding new crop quality. Mexico Roma and snacking tomato supply is steady with light demand and good quality. Mexican Tomato on the Vine volume is stable. California production is forecasted to begin in 7–10 days.



Broccolini/Sweet Baby Broccoli – Quality is good, but supplies are light for some growers, who may hold to averages for a few weeks.



Chili Peppers – Baja, La Paz, and Mexicali are harvesting. California Desert has small volumes. San Luis Potosi, Mexico, starts Pasilla next. Central California is a month out with a small harvest.



Avocados – The U.S. avocado industry saw stable volume last week, leading to declining USDA pricing, especially for larger fruit. Demand remains light. Mexico's market share is dropping, likely falling below 50% soon as Peruvian volumes increase. The 2025 Peruvian season is underway, offering promotional opportunities through summer. California's crop is peaking on 48s and 60s, with strong volumes through June and excellent quality. Colombia's Traviesa crop is also progressing well with promotional volumes.



Melons (Cantaloupe/Honeydew) – Offshore season is ending, transitioning to desert. Yuma cantaloupe production is increasing, with 9s then 12s, and jumbo fruit expected next week. Desert cantaloupe quality is excellent (Brix 13–15%). Honeydew production is strong, with an excellent mix of 5s and 6s; jumbo fruit is also expected. Domestic honeydew is mostly clean with some wind scarring (Brix 12–14%).



Asparagus – Baja has low volumes due to weather. Peru reduced exports due to increased domestic and Canadian production. Michigan production is slowed by cold nights. Markets are more active due to tightened supply.



Artichokes – Quality and supply are good.



Corn – Excellent supply from Coachella and Brawley. Florida volume is steady, with Georgia coming soon. Quality is good across all locations.



Parsley – Supplies and quality are good.



Green, Red & Napa Cabbage – **Green:** Supplies and quality look good. Napa: Quality and supplies are improving, but some insect pressure exists. Red: Quality and supplies are good.



Cauliflower – Quality is good, but supplies are light for some growers.



Fennel – Supply is short due to lower yields, leading to escalated pricing until supply improves.



Kale – Supplies have improved, and quality is good.



Bell Peppers – Green bell pepper supply is short in Nogales for large sizes. Coachella has good green bell pepper supply across all sizes, with larger sizes commanding a premium. South Florida's green bell pepper season is ending, transitioning to South Georgia. Quality is good for all green bell peppers. Color bell peppers have good supply from Nogales and South Florida, with mostly good quality. Canadian greenhouse bell pepper volume is good, with outstanding quality. Expect La Rouge yellow and reds from the desert and South Georgia by mid-May.



Onions – Market stable until Northwest supply ends (May). Texas and Southern California have large crops, limiting optimism for April/May. June is a wildcard: as older regions finish, New Mexico and Central California take over, potentially shifting the market.



Bok Choy – Quality is good, but supplies are limited, driving the market.



Lettuce, Iceberg & VA Blends –Supplies and quality good, but Sclero and INSV present in some fields. This will decrease some growers' supply. Market expected to firm up. Iceberg VA: Quality and supplies good; could be affected by persistent INSV.



Lettuce, Romaine & VA Blends – Quality and supplies good. Some fringe burns and light cupping reported. Insect pressure may become an issue with spring weather. Initial reports of small amounts of INSV and sclerotinia in some fields. Monitoring; market trending higher. Romaine VA: Quality and supplies good; could be an issue if INSV persists.



Lettuce, Red & Green Leaf – Quality and supplies good.



Leeks – Supply is very tight, with some growers holding to averages. The market remains escalated.



Spinach – Supplies are limited for some growers, quality is good overall. Minor reports of weak texture, discoloration, wilting, and insect damage.



Pineapple – Remain tight with no improvement expected until late May. We suggest flexibility in sizes to ensure supply chain stability. Overall quality and taste are good.



Ginger – Supplies and market are steady.



Carrots – Desert regions are finishing, transitioning to Central San Joaquin Valley and southern Monterey County with good supplies and very good quality.



Celery – Quality is good, but supplies are light for some growers. Sizing is shifting towards 30/36ct. Some growers will transition to Salinas in June, tightening supplies. The organic market has increased.



Brussel Sprouts – Quality and supplies are improving, but sizing leans medium/small, and jumbos are very limited. Insect injury and elongated core are issues. The market has eased from extreme but remains escalated.



Lemons – Very good quality from all California growing areas. 165s and smaller in extremely light supply for weeks. Mid-to-larger sizes (140s+) available; market strengthening on smaller sizes. Ample lead time needed for small sizes; most shippers holding to averages.



Limes – Extreme shortages on large sizes (110s, 150s, 175s). High temperatures and no rain accelerated maturation, leading to prevalent smaller sizes (200s, 230s, 250s). Market remains elevated on large sizes for weeks. Increasing concern for quality.



Mandarins/Grapefruit/Specialties – Blood Oranges packing, finishing early June; small sizing. Cara's available, finishing soon. California Mandarins significantly lighter supply, strong market, finish end of May. California Grapefruit available: light Fancy grade, Choice grade available.



Oranges – Quality is good, demand good. Pricing on 88s and smaller strengthening; size structure trending larger. Ample lead time needed for small sizes; shippers holding to averages. Navel season ends early-mid June. Valencia harvest starting, light availability late May, most shippers begin early June. Valencia crop projected lighter volume than last year; early fruit smaller, larger sizes increase through summer.



Eggplant – Domestic supply increasing from the desert with outstanding quality. South Georgia expected next week.



Watermelon – Volume is steady from Mexico and Florida, with good deals and outstanding quality.



Mushrooms – Promotable volume available, quality is good.



Snow Peas & Sugar Snaps – Guatemalan snow pea supply is limited; sugar snap production is steady but may have quality concerns due to humidity. Mexican production of both is stable.



Bananas – Imports will remain extremely light for the next four weeks due to record demand, lighter tropical supply, and logistical issues from Panama labor strikes. Minor pro-rates are possible. Quality is good and improving. Inventories are light, leading to faster turns; some fruit may not fully ripen before arrival. We advise closely monitoring ripeness and possibly holding extra inventory to manage color.



Table Grapes – Red grape supply is stable; offshore greens are rapidly winding down, affecting markets. Mexico is just starting green and red crossings; expect potential green supply gaps for 7–10 days. We recommend substituting reds as needed. California will start mid to late June. Once transitions are complete, forecasted volume and quality should be stable.



Garlic – The 2024–2025 California season is ending, creating a supply gap until the new harvest begins in early August. Growers will supplement with Mexican product from mid-May. Quality remains very good.



Green Beans – Good supply with new crop from Georgia and Florida. Coachella should increase next week. Quality is good.



Zucchini/Yellow Squash – Good volume from South Georgia; Florida is mostly done. Western supply is transitioning from Sonora to Baja and California. Quality is good.



Fresh Herbs – Eastern basil quality is impacted by rain in Colombia. Imported chervil volumes are limited due to adverse weather in Ecuador. Western basil supply and quality are improving. Supply on all other herbs remains stable.



Chayote Squash – Availability fluctuates with Veracruz weather; lower volumes and high prices for good quality due to recent quality issues.



Cactus Pads/Diced – Better volumes; good time for promotion (May/June).



Cherries – Great crop out of California.