

OVERVIEW:

South Florida is winding down, with many items transitioning to South Georgia. Nogales and McAllen are seeing significant tomato transitions as Sinaloa concludes. The tomato market remains firm with good quality from Mexico; Florida may see rain issues. We anticipate tomatoes from California, South Carolina, and South Georgia by early June. Mixed vegetable transitions to California and South Georgia are well underway, with Coachella offering good corn and green bell production. New crop slicer cucumbers are increasing from Georgia and Baja. Limited supplies persist for premium green bells, pickles, shishito peppers, tomatillos, and habaneros. Offshore table grape quality and supply are stable, with Mexico starting soon. Offshore melon volume will decline as the season ends, with desert fruit starting shortly. Banana and pineapple availability is limited; flexibility on pineapple sizes is requested. Banana supply will be volatile due to a Panama labor strike, though major shortages aren't expected. New crop yellow/white peaches, cherries, and apricots are available from California and the East, with volumes increasing. Plums are a few weeks out. Avocado supplies have risen for Memorial Day promotions, but demand and field prices are expected to soften post-holiday. Mexico is nearing its season end, with Peru's offshore arrivals ramping up. Late-season Mexican fruit shows high dry matter and more Grade 2s. California is harvesting strong, consistent quality. Peru is steadily shipping to both coasts. Total U.S. avocado volume should remain stable through June, with Peruvian supply doubling, likely keeping market prices soft. The upcoming Mexico Loca crop transition is key, with no delays currently anticipated. Salinas is experiencing warmer weather, with monitoring for lingering effects on wet vegetable items. Insect pressure has been minimal. Overall, supplies and quality remain good. Lettuce supplies and quality are changing for some growers due to INSV, leading to decreased supplies and potential market firming. Broccoli and cauliflower look good with ample supplies, but broccolini is tightening, causing price increases. Spinach quality and supplies are just okay. Brussels sprouts remain light in supply, with the market still extreme, though quality and supplies are improving and trending down. Jumbos are limited, with sizing leaning small to medium. Leeks remain escalated due to supply shortages. Parsley has returned to regular pricing and looks good. Overall production in Salinas is steady.

ALERT LIST:

ESCALATED

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

EXTREME

Brussel Sprouts, Organic Celery, Lime (Large)

WATCH LIST:

Asparagus, Broccolini, Pineapple, Red Cabbage, Celery, Cilantro, Fresh Herbs, Honeydew, VA Lettuce Iceberg, Lemon (Small), Oranges (Small), Pineapple, Ginger, Green Onions, Romaine & Romaine Hearts, Snow Peas & Sugar Snap Peas, Spinach, Yellow Squash, Eggplant, Oranges + Lemons (Small)



Strawberries – Volumes are improving with favorable weather. Santa Maria expects increased production over two weeks, maintaining strong quality. Last week was peak production for many blocks, holding steady before tapering. Organic volumes are building, peaking by early June for strong late-June supply. Watsonville/Salinas has cooler, dry weather, preserving quality, though some bruising is noted. Organic fruit is smaller but good. Production estimates are rising, peaking in June. All pack sizes available with strong volume and quality.



Blackberries – Mexico's hot weather is impacting quality despite generally strong attributes. Volume is in a dip through early May, peaking late May–June. Organic production resumes early May. Conventional production began minimally in Watsonville.



Raspberries – Mexico's hot conditions affect some fruit quality. Volume is in a dip but expects steady increases through May, then a brief slowdown before rebounding in July/August. Organic production resumes next week. Watsonville conventional production projected for July.



Blueberries – Mexico's conventional volume is declining weekly, ending by July; organics in August. Quality is good but with heat-related issues. Oxnard's organic production is past peak, declining until late May with excellent quality. Florida is at peak but declining, with volumes 30–50% below forecast due to prior weather, though quality is excellent. Other regions also see reduced yields. Central Valley's warm weather accelerates organic (at peak) and conventional (initial harvests) production. Limited open market availability.



Cucumbers – Slicer: Lighter supply through Nogales/McAllen. Baja volume will ramp up, while Florida finishes, transitioning to South Georgia. Quality is good; markets firmer due to transition, expecting better volume in two weeks. South Georgia production has begun with good quality. **English:** Good supply crossing from Mexico, with new crop quality being good.



Green Onions – Supplies and quality look good, but initial reports indicate light supplies.



Potatoes – Market stable, but carton production is declining. Norkotahs will phase out in 3–4 weeks, shifting supply solely to Burbanks, causing a notable production drop and expected market increases. Stronger demand could boost the market further. Planting for next season has similar acreage. Concerns exist about consistent supply if yields remain unchanged.



Broccoli, Florets & Crowns – Quality and supplies are good.



Broccolini/Sweet Baby Broccoli – Quality is good, but supplies are getting light. Expect growers to escalate pricing due to increased market and limited supplies in coming weeks.



Tomatoes – East Coast: Rain and light production have escalated Round, Roma, and Snacking tomato markets; expect mixed quality. GA/SC starts next month, should stabilize. Mexico: New crop Round tomatoes are plentiful from Jalisco/Baja/Central Mexico with outstanding quality, though winter residual issues persist. Roma and Snacking tomatoes have steady supply, light demand, pushing FOBs down. TOV volume is stable. California, Georgia, and South Carolina: All forecasted to start in early June.



Chili Peppers – Baja and Mexicali supply is short. Nogales is seeing last harvests from deeper South, with suspect quality. Chihuahua volume is limited. All await increased Baja/California supply. Tomatillo supplies are very short, spiking prices.



Avocados – U.S. avocado volume hit 59.6M pounds last week, a 3% decrease, with Mexico's share down 12%. Volumes should remain steady through June, but Mexico's share is expected to drop below 50%, while California and Peru each reach 25%. Field fruit is mostly small, high in Grade 2s. The Main Crop has five weeks left; the Off-Bloom Crop should start around July 1st. California harvested 15.4M pounds in week 20, peaking on 48s/60s, with strong quality and steady summer volume. Peru's 2025 season is underway, with consistent U.S. arrivals and strong sizing/quality. Colombia offers promotional opportunities on smaller fruit.



Melons (Cantaloupe/Honeydew) – Stronger retail demand and delayed vessels have tightened the offshore cantaloupe market, firming FOBs. Expect a full offshore-to-desert transition by month-end, with regional desert distribution starting. Offshore volume will decrease. Florida offers Bin Athena, Mexico offers cartons. Quality is excellent: strong shelf life, high color, Brix 14–16%. Sizing shifts to 9s/12s; 15s limited. **Honeydew:** Production is extremely short due to a Mexican supply gap. Sizing flexibility is necessary for the next 7–10 days. Brix is mostly 12–14%, with mixed shell quality.



Asparagus – Baja continues with low volume due to weather. Peru's volume is increasing, though mostly smaller sizing. Michigan has started with good production, but cooler nights next week may slow it. Markets are less active with more Peruvian and domestic grass available.



Artichokes – Quality and supply are good.



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



Parsley – Supplies and quality look good.



Green, Red & Napa Cabbage – Green: Supplies and quality look good. Napa: Quality and supplies are improving, but some insect pressure is noted. Red: Quality is good, but supplies are still light with some growers. The market remains very active.



Cauliflower – Quality and supplies are good.



Fennel – Lower field yields are causing a supply shortage. Pricing will remain escalated until supplies improve.



Kale – Supplies have improved, and quality is good.



Bell Peppers – Green: Nogales has short supply (large sizes). Coachella is in full production with good supply on all sizes, premiums on large. South Florida sees higher prices on premium sizing; transitioning to South Georgia around May 10th. Color Bell Peppers: Good supply from Nogales and South Florida; mostly good quality. Canada's HH Bells have good volume and outstanding quality. Expect La Rouge yellow and reds from the desert and South Georgia by mid-May.



Onions – The onion market won't react significantly until the Northwest finishes, likely in May. Texas and Southern California are starting with large crops, so April/May optimism is low. June is a wildcard: with primary regions done, the market shifts to New Mexico and Central California, offering potential for change.



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



Lettuce, Iceberg & VA Blends – Iceberg lettuce supplies and quality are good, but INSV is appearing in some fields. Expect market firming. Iceberg VA: Quality and supplies look good but could be affected by persistent INSV.



Lettuce, Romaine & VA Blends – Quality and supplies are good. Some fringe burns and light cupping reported. Insect pressure is a potential issue with spring weather. Initial reports of small amounts of INSV and sclerotinia in some fields are being monitored. The market is trending higher. Romaine VA: Quality and supplies are good but could be affected by persistent INSV.



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



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



Spinach – Supplies and quality are good. Minimal reports of weak texture, discoloration, wilting, and insect damage.



Pineapple – Supply remains tight, with no improvement expected until late May. Flexibility in sizes is advised. Quality and taste are good.



Ginger – Supplies and market are steady.



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



Celery – Quality is good, but supplies are light with some growers. A major grower's transition to Salinas in June will tighten supplies. The organic market has increased.



Brussel Sprouts – Quality and supplies are improving. Sizing still leans towards medium and smalls, with very limited jumbos. Insect injury and elongated core are main obstacles. The market has continued to rise and will stay escalated until supplies normalize.



Lemons – Quality is very good from all California areas. 165s and smaller will be extremely light for 4–6 weeks. Mid-to-larger sizes (140s+) are available; smaller size markets are strengthening. Ample lead time is necessary for orders, especially small sizes, as shippers hold to averages.



Limes – Extreme shortages on large sizes (110s, 150s, 175s) persist. High temps & lack of rain sped up maturation, leading to a prevalence of smaller limes (200s, 230s, 250s). The market remains elevated on large sizes for weeks, with quality concerns.



Mandarins/Grapefruit/Specialties – Blood Oranges & Cara Caras finishing this month; sizing is small. CA Mandarin supplies lighter, market very strong, finishing by May end. California Grapefruit is available, with light Fancy grade & available Choice grade.



Oranges – Quality and demand remain very good. Pricing for 88s and smaller is strengthening as sizes trend larger. Ample lead time is crucial, especially for small sizes. Navel season ends early-to-mid June. Valencias are very light by late May, most shippers starting early June. The Valencia crop is projected lighter, with early fruit smaller, then increasing in size through summer.



Eggplant – Domestic supply is lighter, quality mixed. Good supply and excellent quality from Mexico this week. South Georgia and California should start next week.



Watermelon – Supply is improving, but demand remains strong from Mexico and Florida. Smaller sizes will remain tight, as new fields produce mostly larger fruit. Prices are expected to stay strong on bins and cartons, with some deals on 11ct minis.



Mushrooms – Promotable volume is available, and quality is good.



Snow Peas & Sugar Snaps – Guatemalan snow pea supplies are limited; sugar snap volumes are stable, though humidity may cause quality concerns. Mexico's production of both snow peas and sugar snaps remains steady.



Bananas – Imports remain very light for four weeks due to record demand, lighter supply, and Panama labor strikes. Minor pro-rates are possible. Quality is good and improving. Inventories are light, leading to high turns; some fruit may not reach optimal color. Distributors should monitor ripeness and consider extra inventory for color management to prevent shortages.



Table Grapes – Stable supply is available. Mexico starts in 7–10 days, California mid to late June.



Garlic – The 2024–2025 California garlic season is ending, creating a supply gap before new crop harvest. Starting May 19th, growers will supplement with Mexican product until new California garlic begins the first week of August. Quality will remain very good through this transition.



Green Beans – Good supply available with new crop from Georgia & Florida. Coachella should ramp up next week. Quality good.



Zucchini/Yellow Squash – Good volume and quality from all Florida locations for Italian and Yellow. South Georgia production has started with ramping volume and good quality. Nogales is winding down for the season, transitioning to California and Baja.



Fresh Herbs – Eastern basil quality is impacted by persistent rain in Colombia. Imported chervil from Ecuador is limited due to adverse weather. Western basil supply and quality are steadily improving. All other herb supplies remain stable.



Chayote Squash – Availability remains inconsistent due to volatile Veracruz weather. Rain increases volume, heat reduces it. Prices remain high for good product.



Cactus Pads/Diced – Volumes are improving with good weather. Good for promotions through May.



Cherries – Beautiful crop straight from California available.