



Weekly Market Review January 3, 2025

Overview

We are starting to see improvements out of South Florida on several commodities; however, we still expect to see some bumps in the road over the coming weeks: Eggplant, Color Pepper, Citrus, and Mixed Hot Pepper active. Tomato supply out of the Immokalee is ramping up and should see stable production going forward. Green Peppers and Squash seem to be in good supply. The Offshore Table Grape season is slowly moving along; there are still a few domestic grapes left, but the quality will be fair at best. Pricing is firm but should start to improve over the coming weeks. Honeydew will be a challenge over the next three weeks; transition combined with delays due to weather in South America has limited availability and quality fruit. Flexibility is very important during this transition to limit the portions of honeydew being served or outright subs if there are any shortages. Supply should improve over the next three weeks. In the West, tighter supply is available to the market on Mushrooms; weather impacts and viral pressure have caused supply shortfalls across the region on all varieties. Avocado demand remains high with New Year's promotions and the upcoming healthy eating month. The reduced holiday harvest and packing schedules in Mexico have impacted available supply, and prices are now increasing as a result. Prices on large and jumbo fruit remain at a high premium due to the current size curve and overall demand. The industry anticipates a more normal harvest and packing schedule to resume next week, and prices are expected to remain strong through January. Herb demand from restaurants and retailers has been exceptionally high over the past two weeks. As a result, the new year is expected to begin with some supply challenges, which is a typical occurrence for early January. The intense holiday demand has necessitated a recovery period for the plants, which generally takes approximately two weeks. We have entered the new year, and the transition is finally complete. Quality and supplies have continued to improve, and the weather in Yuma is looking good. There is still some ice in the mornings, but overall, the weather is warming up. Morning lows are in the mid-upper 30s, but the highs are crawling up to the mid-upper 70s. Broccoli is still escalated, but quality and supplies have really improved. Endive, Escarole, Leeks, Cilantro, and Fennel are still escalating. Bok Choy and Artichokes have stayed at the extreme trigger. Cauliflower has come off the extreme trigger but is still escalating. Quality is just okay, but supplies are improving. Spinach is also still escalating but will likely be back to normal pricing soon. The market is trending down. Broccolini is finally seeing some relief, and growers should be able to fill orders in full. Some will still be holding to averages, but supplies have improved. Green Cabbage, Red Cabbage, Celery, and Brussels Sprouts are also all still escalated. Supplies for all Cabbage items are improving. Brussels sprouts have been in higher demand because of the holidays but should start seeing some relief soon. Some growers are still struggling with supplies since the mornings are still cold, but things are starting to improve across the board. As a reminder, some growers have items that do not transfer to Yuma, so they will have fees throughout the Yuma season. Happy New Year, everyone!

Market Alert List

- **Asparagus – ESCALATED**
- **Artichokes – EXTREME**
- **Avocados – ESCALATED**
- **Bell Pepper (Red, Yellow and Orange) – ESCALATED**
- **Bok Choy – EXTREME**
- **Broccoli, Florets and Crowns – ESCALATED**
- **Brussel Sprouts-ESCALATED**
- **Cabbage-Green – ESCALATED**
- **Cabbage-Red-ESCALATED**
- **Cauliflower – EXCALATED**
- **Celery – ESCALATED**
- **Cilantro – ESCALATED**
- **Endive and Escarole – ESCALATED**
- **Fennel, Anise – ESCALATED**
- **French Beans – ESCALATED**
- **Hot Peppers (Habanero, Shishito) – ESCALATED**
- **Leeks – EXTREME**
- **Lettuce, Boston – ESCALATED**
- **Melon – Cantaloupe and Honeydew – ESCALATED**
- **Napa – ESCALATED**
- **Parsley (Italian & Curly) – ESCALATED**
- **Spinach – ESCALATED**
- **Strawberries – ESCALATED**
- **Table Grapes – ESCALATED**
- **Tomatoes (Rounds, Romas and Snacking Tomatoes) –ESCALTED**

Watch List

1. **Broccolini**
2. **Ginger**
3. **Snow Peas & Sugar Snap Peas**
4. **Limes – ALL SIZES**

Fruits & Vegetables

Avocados: ESCALATED A total harvest of 37.9M pounds was recorded for week 52, with 33.5M pounds shipped to the U.S. Jalisco accounts for 9.1% of the volume exported to the U.S. from Mexico. The Main Crop currently has a dry matter estimate of 28.4%. Field availability is stronger for smaller sizes, while sizes 40 and larger remain in tighter supply. An extended rainy season has contributed to an increase in grade 2 fruit. Harvest volumes are expected to decrease this week due to the New Year holiday. Additionally, the USDA has imposed restricted packhouse production hours across the industry, further limiting packhouse capacities. The peak of Colombia's Principal Crop remains in full swing, with steady volumes being shipped to the U.S. However, a slight decline in volumes is anticipated in the coming weeks due to supply chain challenges and reduced harvesting during the holiday period.

Bananas: Supply remains stable now and shortages were averted as the strike has been postponed. Over quality remains good across the country.

Pineapples: Supply will remain lighter than average. The overall quality is good. Flexibility in size may be needed.

Table Grapes: ESCALATED Current table grape supply is tight but the quality on the offshore fruit is good. We are starting to see more greens arrive this week. There are a few lingering reds in the west and quality on those will be fair at best. We hope to see improved supply by the 3rd week of January.

Berries

Strawberries: ESCALATED Supplies are increasing out of most growing areas. Santa Maria's weather remains mild, with daytime highs in the low 70s and cool nights. Light rain this week and next is not expected to impact production significantly. Fruit quality is improving, with reduced decay, though variability in size persists. Overall volumes are stabilizing but will gradually decline through December. Organic fields under tunnels maintain production, while spring crop fields show promising early growth with anticipated harvests starting late December or early January. Mexico continues to see warm daytime temperatures support steadily increasing production, but quality remains a concern with issues like bruising and white shoulders upon arrival in Texas. Warmer temperatures in Florida boost production and quality, though green tips remain from earlier cold snaps. Production is ramping up significantly, with specialty packs now in limited production.

Blackberries: Out of Mexico, quality is strong, with medium to large berries showing good sheen and firmness. Some red cell regression and soft fruit are noted. Steady volumes are expected for the rest of the year, with transfers to Texas maintaining freshness.

Raspberries: Out of Mexico, quality is good, with strong color and firmness, though occasional overripe or crumbled fruit is noted. Volume remains steady, with transfers to Texas ensuring freshness through the season.

Blueberries: Out of Mexico, volume has passed its first peak and is gradually declining, with another peak expected in February. Organics experienced a gap due to cold weather but will recover next week. Conventional and organic volumes remain relatively steady, with minor quality issues like shriveling and leakage. No shipments this week out of Peru, but arrivals are expected next week, featuring high-quality fruit. Production is slowing, with final shipments anticipated in January. Out of Chile, cooler weather supports steady production, though volume is decreasing in northern regions. Peak exports are expected by mid-January. Quality remains high with large, firm, sweet berries, despite occasional slow-ripening issues. Delays at ports are noted. Organic blueberry production is expected to begin in January out of Oxnard, CA.

Citrus

Oranges: Quality from California is very good with sizing continuing to run heavy to 88s, 113s and 138s. 72's and larger remain in lighter supply although availability of larger sizes continues to improve,

Lemons: Good supplies continue with very good quality out of all growing areas in California. Sizing is running heavier to smaller sizes, but large sizes are available. Advanced ordering is recommended for large sizes.

Limes: WATCH LIST As we transition into the new growing areas during Q1, quality remains good, though supplies are much lighter. Expect a significant jump in pricing, which is anticipated to last through January and into February before we see markets and supplies start to stabilize.

Imports/Specialties: California Mandarins and Grapefruit are seeing much better supplies with very good quality. Cara Cara volume is increasing with promotable volume continuing into January. Blood Orange volume continues to increase with very good quality.

West Coast Lettuce

Iceberg: Lettuce supplies and quality are improving. Weights are better but are still slightly lower than normal. Yields are improving as the weather warms up in Yuma. We expect to see an increase in overall demand as we start the new year. Iceberg VA: Quality and supplies are improving. You may still see some growers holding to averages but the market is starting to even out.

Romaine, & Romaine Hearts: Romaine and Romaine heart supplies have improved. For Romaine, we are starting to see a bit more maturity and better weights. Heart material is slowly increasing and allowing for lighter greens and yellow to be seen in the finished product.

Romaine VA: Quality is good, and supplies are improving.

Green Leaf and Red Leaf: Overall quality and supplies look good. Weights and sizing are still light, but the weather is improving so weights and supplies will get better soon.

Eastern and Western Vegetables

Green Bell Pepper: Markets remain firm this week, but supply is improving in Nogales and South Florida. Quality is mostly good.

Color Bell Pepper: ESCALATED Markets remain very high and supply light crossing from Mexico. Orange looks to be the item to sub over to from yellow and red on the spot market. The quality of being packed is mostly good.

Mini Sweet Pepper: Supply stable this week loading in Nogales.

Mixed Chili Pepper: ESCALATED Supplies in general are good across most varieties out of Mexico: Jalapeno, Serrano and Poblano were good this week. Fresnos, Habanero and Shishitos are the shortest this week. We still expect supply GAPS in the East due to the weather.

Eggplant: Overall good supply from all growing regions. Quality is good.

Slicer Cucumbers: Good supply crossing through Nogales and McAllen as well as Florida. Quality is good.

English Cucumbers: Good supply available this week crossing from Mexico. Quality on new crop out of Mexico was good.

Pickles: Improving supply available crossing through Nogales. Quality is good.

Green Beans: Good supply available and quality is good crossing through Nogales as well as loading in Florida.

French Beans: ESCALATED Production continues to improve out of Guatemala, but growers have noticed moisture in the bags due to shipping delays. Limited supply of French beans out of Mexico due to weather.

Zucchini/Yellow Squash: Good volume available crossing through Nogales and available in Florida.

Herbs

Demand has been very high for the past two weeks with restaurants and retailers. With such high demand, the new year will be starting off with some supply issues. The following herbs will be in short supply for at least the next two weeks: **Basil, Chives, Sage, Thyme, Tarragon, and Mint.** This is very common and normal for the start of January. The heavy holiday demand causes the plants to recover, and they normally take 2 weeks or so for sunshine to return.

Melons

Both cantaloupes and honeydews reached “demand exceeds supply” levels due to the effects that followed Tropical Storm Sara almost four weeks ago. Although we have experienced lower yields on both commodities, to date we have fared much better on the cantaloupe than the honeydew. We began advising three weeks ago of a potential volatile December and that has definitely come to fruition with the honeydews

Cantaloupe: ESCALATED Quality is very nice on the fruit arriving from Guatemala; sizing is primarily 9s followed by 12s and 9Js while brix levels have been mostly in the 12-16% ranges with some higher. Demand is strong right now and is expected to remain high through January as the rain from Tropical Storm Sara has impacted fields in Honduras and Costa Rica which were scheduled to begin harvesting in four weeks. Shippers with fruit from those regions are already advising customers that no promotional pricing will be provided over the next 2-3 months as there is concern with bacteria in fields negatively impacting yields. We will continue to monitor this situation and provide further input on future updates, but we are expecting higher markets to remain in place both in the short and long term.

Honeydew: ESCALATED With very limited supply crossing through Nogales and the offshore volume being down 30 – 50% (depending on field location and the amount of rain received) following TS Sara, there just has not been enough production to satisfy the industry. We will continue to battle this for the next 3-4 weeks and ask for flexibility in sizing and subs where necessary to maintain service levels as we are unclear as to when supply will improve at this point in the season.

Watermelon: Lighter supply available and demand is light. Fruit is being harvested from Texas as well as Mexico.

Mixed Vegetables

Artichokes: EXTREME Supplies remain limited and will continue to be tight throughout the year. The market is still at the extreme trigger. Growers are holding to averages. Quality is good.

Asparagus: ESCALATED Southern/Northern Baja production is still low due to seasonality. Northern Sonora (Caborca) continues with low volume due to cold temperatures. This should change in the next two weeks. Peruvian volume continues to decrease due to quality and seasonality. Markets are not as active as expected, even with less production in the market.

Bok Choy: EXTREME Quality is good, but supplies are still limited. The light supplies are driving the market.

Broccoli/Broccoli Crowns: ESCALATED Quality and supplies are improving. Supplies are going to be limited for most growers for at least a few more weeks. It is cold in the mornings in Yuma and that was not helping the broccoli grow but the weather is improving so the supplies are getting better. Floret Mini's are also tight, and some growers are extremely short on those.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality is good, but supplies are light with some growers. Expect this item to be an issue throughout the year. Demand is very strong, and supplies continue to be limited but growers are starting to be able to fill full orders. They are just still holding to averages.

Brussels Sprouts: ESCALATED Quality looks very good, but some growers have tight supplies, and it is driving the market up.

Carrots: (JUMBOS, MEDIUMS and CELLOS): WATCHLIST Jumbo Carrot supplies are light, but supplies remain steady on all other sizes and packs with good Quality.

Cauliflower: ESCALATED Supplies are light, and quality is just okay. There is slight discoloration, and weaker texture has been reported. The Cauliflower market is still very active, but those cold mornings are still limiting the harvesting. The weather in Yuma is starting to improve but it will be a few weeks before we see some relief on this item. Caulilini is also affected and is seeing very tight supplies.

Celery: ESCALATED: Quality and supplies are okay. There has been some weak texture reported causing some mechanical damage. Growers are still able to cover contract business. Supplies are improving but the market is very active.

Corn: Current supply has improved, and demand has put downward pressure on price. Overall quality is good but note that corn will be smaller this time of year as well due to less sun which typically slows the growth of the ears and produces smaller kernels.

Fennel: ESCALATED The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve.

Kale: Supplies have improved, and quality is good.

Leeks: EXTREME Leeks are very tight right now and some growers are holding to averages. The market remains escalated.

Garlic: California Garlic is showing very good quality with lighter supplies. Demand is good.

Ginger: Supplies and markets are steady.

Green Cabbage: ESCALATED Supplies and quality are improving. The market is still escalating but it should start to level out soon.

Green Onions: Supplies and quality look good.

Mushrooms: Supply stable and quality is good.

Napa Cabbage: ESCALATED Quality and supplies are improving but there is some insect pressure.

Parsley: ESCALATED (Italian & Curly): Supplies are improving but the light supply in some markets is driving the market. Quality is okay.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

Red Cabbage: ESCALATED- Pricing is escalated. The quality is good, but supplies are tight. Light supplies are expected for at least the next 2 weeks. The market remains very active.

Spinach: ESCALATED Supplies are improving. Some growers are still holding onto weekly averages, but the market is starting to level out. Relief should be coming soon on this matter.

Snow Peas and Sugar Snaps: ESCALATED Markets are less active out of the east. Guatemalan snow pea production continues to improve. Sugar snaps production continues to be low. Markets out of the west continue to be very active. Snows and Sugar snaps domestic supply is gapping. Mexican production is low as well due to weather.

Onions: ESCALATED

The Pacific Northwest storage supplies generally take a bit of a price increase in early Q1. While this is no guarantee, we do anticipate this will be the case on white and red onions. White supplies were light to begin with in the PNW, and we do not anticipate relief there until Mexico begins crossing their supply, which should take place around the middle of Q1 in February. They are typically not very big red suppliers, so we may see the continued pattern of reds remaining elevated until we get into the Spring/Summer months in California. Now, all reports are that Mexico will have a healthy crop in terms of quality and volume. Because of this, we are not anticipating the market to be volatile soon. However, the Texas crop is still too early to predict. The onions are still far from 'made' that a weather event could still impact their crop. If that were to happen, we would likely see a swift increase on all colors and sizes near the end of Q1.

Potatoes:

No major changes are expected in the short term. Size profiles remain balanced now, with volume deals on count carton sizes alternating a bit on a weekly basis – meaning one week it will be a 40/50, and the next it will be 80/90. Overall, size does seem to be more plentiful than smaller size count cartons. We will likely begin to see Norkotah supplies taper off toward the end of Q1, with most growers transitioning to Burbanks only during the beginning of Q2. When this takes place, we anticipate that supply could tighten up some as yields were believed to not be as plentiful in Burbanks as they were in Norkotahs this past year. It remains to be seen just how impacted pricing will be, and on what sizes exactly. However, we do feel confident that we will not see a cheaper market than we are seeing today.

Tomatoes: East Coast

• **Round and Romas Tomatoes: ESCALATED-** Harvesting has ramped up and supply is improving daily. We expect to see a more normal market by the middle of next week. Quality will improve daily. We are watching a cold front that will impact the area later this week which could slow down production for the following week.

• **Snacking Tomatoes: ESCALATED-** Supply is slowly improving. Quality is good. We are watching a cold front that will impact the area later this week which could slow down production for the following week.

Tomatoes: Mexico

- **Round Tomatoes: ESCALATED**- New crop available and pricing is down this week. The quality has been good.
- **Roma Tomatoes: ESCALATED** – Markets are hanging in there but expected to drop this week. Supply and quality are good.
- **Grape Tomatoes: ESCALATED**- Improving supply and poor demand has put downward pressure on price this week. The supply is expected to improve daily over the next week. Quality is good.
- **Cherry Tomatoes and Medley Tomatoes:** Steady supply available and Quality is good.
- **Tomato on the Vine:** Steady volume available this week.

Other Fruit:

Apples: Last year, Washington State Apple growers shipped just over 136 million boxes of Apples. This year's total is projected at 124 million. Prices will likely be higher this year and much more manageable of a crop.

Projections below

- **Red Delicious** – 4 million down from last Season
- **Gold Delicious** – 280,000 boxes down from last Season
- **Gr Smiths** – 1.1 million boxes down
- **Fuji** – 1.5 million boxes down
- **Gala** – 3 million boxes down
- **Honeycrisp** – 5 million boxes down
- **Cosmic** – Up 2.7 million boxes.

Pears: The Northwest Pear Crop (Washington/Oregon) is substantially down from last season due to below average temps in late Feb/early March affecting bud development. The higher elevation areas in Washington were severely impacted, especially the Wenatchee Valley. The Oregon Growing Region was not affected as much as Wenatchee, Washington, but it was still impacted.

- **The Bartlett Crop** out of the Northwest shows 3.8 million shipped last season vs a projected 2.9 million this year for a 14% decrease. It's not substantial in terms of overall volume, but it's still a factor. The cold temperatures will affect the grade, so more Fancy's will be packed than normal. Because the crop is smaller, the size profile has increased by 1 to 2 sizes. Barts to finish by the end of Feb./ first part of March.
- **Anjous** report at least a 30% total decrease, or 1.85 million boxes less than last year. Also, out of the Wenatchee Valley, there will be more fancy and, for the first time in many Years, a 3rd grade Anjous packed. When we start to pack Anjous – I will share pics of 3rd grade, this will be your value pear. Anjous to start the week of September 16th, and if growers make it through June I will be surprised.
- **Red Anjous** are down 7% or 47,000 boxes, so it is nothing dramatic like the others. The question on Red Anjous is whether or not we will see smaller pears such as 120/135cts. Red pears are supposed to be 1 to 2 sizes larger out of the PNW. Red pears have started with
- **Starkrimsons** and will transition into Red Anjou from November through May.
- **Bosc** are down 63% out of the great Northwest or 1.38 million boxes. This variety was mostly affected, and markets will be much higher than in previous years. Bosc has slowly started with a potential end date last January/middle of February.

Pomegranate: Good supply available this week.

Asian Pears: Peaking in volume Quality is outstanding.

Tree Fruit: Limited Supply Available on yellow peach on the east coast.

Kiwi Fruit: Supplies fair out of California as well as offshore landing on the east coast.

Persimmons: Active markets and quality are good on both Hachiya and Fuyu.

Quince: Starting to harvest.