



Weekly Market Review January 31, 2025

Overview

Stable production out of South Florida is expected this week, with good quality and availability across multiple items. Mixed Hot Peppers remain the lightest in supply, while Tomato quality and supply are strong and now in full production. Similar availability and quality are also being observed through Nogales and McAllen. The Offshore Table Grape season is progressing slowly. Pricing remains firm but is expected to improve over the coming weeks. Honeydew volume is also turning a corner, with more vessels arriving this week, bringing daily relief. It is important to note that flexibility on sizing will be necessary to ensure the supply chain is replenished. The banana supply will remain tight into early next week but should gradually improve later in the week. Pineapple availability remains limited across all sizes. As we approach the Super Bowl, supply volumes remain more than sufficient, but demand over the next two weeks is uncertain. Significant price increases and supply shortages have created hesitation around promotions. With high-cost inventory still in the network, post-Super Bowl replenishment is expected to be minimal. While field costs are declining, a sharp drop could prompt growers to leave fruit on the trees. Given Mexico's size curve favoring smaller fruit, allowing it to size up for Cinco de Mayo remains a strategic option. Market fluctuations are expected in the coming weeks as the industry works toward stability. At the start of January, hurricane-force winds and firestorms severely impacted herb production in Southern California and Baja, reducing supply and affecting the entire market. Sage, tarragon, and basil have been particularly affected. The availability of these herbs depends on rising temperatures, with potential supply improvements by mid-February if warming trends continue. However, if cooler temperatures persist, limited availability may extend into early March. Morning temperatures in Yuma remain chilly, with winds and morning freezes still being the biggest issues. Harvesting crews have experienced some delays. Unfortunately, this increases the potential for long-term wind-related damage, which could lead to a decrease in supplies. Significant icing and blistering conditions have been observed on Cilantro, Arugula, Iceberg, Romaine, and other leafy greens across the Yuma Valley. Arugula and Lettuce have been added to the watchlist, and the situation will continue to be monitored. Despite the cold mornings, quality has improved for the majority of other wet vegetable items. Endive, Escarole, Cilantro, Fennel, and Spinach remain escalated, with supply shortages driving market conditions. Spinach is being closely watched and could potentially sustain frost damage. Bok Choy and Leeks remain at the extreme trigger level. Red Cabbage is still slightly escalated, though overall cabbage supplies have improved. However, cold weather is slowing plant growth. If conditions hold, Red Cabbage may come off escalation soon, provided supplies are not further impacted by the weather. As a reminder, some growers have items that do not transfer to Yuma, meaning additional fees will apply throughout the Yuma season.

Market Alert List

- **Asparagus – ESCALATED**
- **Avocados – ESCALATED**
- **Bok Choy – EXTREME**
- **Cabbage, Red – ESCALATED**
- **Celery Organic-EXTREME**
- **Cilantro – ESCALATED**
- **Endive and Escarole – ESCALATED**
- **Fennel, Anise – ESCALATED**
- **French Beans – ESCALATED**
- **Herbs - ESCALATED**
- **Hot Peppers (Shishito) – ESCALATED**
- **Leeks – EXTREME**
- **Melon Cantaloupe – ESCALATED**
- **Melon Honeydew – ESCALATED**
- **Napa – ESCALATED**
- **Parsley (Italian & Curly) – ESCALATED**
- **Spinach – ESCALATED**
- **Table Grapes – ESCALATED**

Watch List

1. **Banana and Pineapple**
2. **Broccolini**
3. **Arugula**
4. **Cabbage, Green**
5. **Cauliflower**
6. **Lettuce, Iceberg**
7. **Lettuce, Romaine**
8. **Limes**
9. **Ginger**
10. **Snow Peas & Sugar Snap Peas**

Fruits & Vegetables

Avocados: ESCALATED U.S. inventories have improved, with significant supply increases out of Mexico to meet demand for The Big Game. Last week's total volumes for the U.S. closed at 79.9M pounds. This week, the current harvest volumes are already dropping, and projections for next week are back down in the low 60M pounds range. Prices remain elevated, but better supply conditions have provided relief across all sizes. Main Crop currently has a dry matter estimate of 30.6%. In the field, availability is stronger for small sizes and sizes 48 and larger are in tighter supply. Due to the extended rainy season, there is a high percentage of grade 2 fruit. Harvest continues to be strong as the industry works to replenish inventories.

Bananas: WATCHLIST Banana imports remain tight but should start to improve next week as more vessels arrive from the Tropics. A combination of cooler and poorer-than-desired weather in the tropics as well as logistic challenges impacted the global supply over the past three weeks. We could see minor pro-rates across the network but that should subside this week. Overall, banana quality has been good despite being in the winter cycle. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to store fruit in warmer locations or wrap fruit. With inventories being light we see higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival.

Pineapples: WATCHLIST Pineapples will remain tight and are not expected to improve until the end of February, with peak volume hitting in May. Flexibility in sizes will be necessary over the next 3-4 weeks.

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; red grapes will remain tight. There are a few lingering reds in the west, and quality on those will be fair at best. Markets are expected to remain firm until we see more Chilean fruit arrivals.

Berries

Strawberries: Overall supplies remain steady. The Santa Maria region experienced fluctuating temperatures, with cold nights in the mid-30s and daytime highs varying from the upper 50s to mid-70s. Conventional strawberries continue to show excellent quality, with large to extra-large fruit sizes and minimal defects. February is expected to bring robust load volumes, ensuring ample supply for Valentine's Day. However, adverse weather, such as heavy rain or frost, could impact production. Mexico's daytime temperatures range from the 80s to 90s, with nighttime lows between the mid-30s and 60s. Large temperature swings have raised concerns about green and overripe fruit, though no rain is forecasted. Production remains at a steady peak, with volume expected to hold through mid-February before gradually declining in March. Cold temperatures and heavy rainfall have impacted the region, with daytime highs in the 50s-60s and lows in the 30s-40s. Despite these challenges, next week's warmer, dry weather is expected to drive a surge in peak volume. Current berries show good firmness and color, but some defects persist, including green tips, frost damage, pin rot, and white shoulders.

Blackberries: Blackberry quality remains strong, with medium to large sizing, good sheen, and firmness. Some issues, including red cell regression, attached calyx, and soft or leaking fruit, have been observed. Volume is holding steady at a consistent peak through the end of July, though a slight dip is expected next week as growers begin pruning. Organic production is winding down earlier than anticipated.

Raspberries: Raspberries are displaying a strong red color, good firmness, and mostly medium-sized fruit with some larger berries present. While some overripe and crumbled fruit is observed, crews are actively working to keep them out of the packs. Volume remains steady at a consistent peak through the end of April, though a slight dip is expected next week as growers begin pruning. Organic production is performing well, with stable availability anticipated through March as peak production approaches.

Blueberries: Mexico's weather remains favorable, with highs in the 80s and lows in the 50s. Conventional blueberry volume is increasing rapidly, with a peak expected in March and a steady supply anticipated throughout the year. Organic production has concluded for the season, with a supply gap lasting until August. Quality remains excellent, though some issues with redberries, leaking fruit, and shriveling have been noted due to a frost event in late December to early January. Peruvian production has ended for the season, with the last shipments expected to arrive in early February. Chilean hot weather continues, with daytime temperatures in the 80s-90s and nighttime lows in the mid-50s. Heat has significantly limited both current and future production, though recent rain in the Araucanía region caused minimal damage. While Chile is in its peak season, overall estimates have been greatly reduced.

Citrus

Oranges: We continue to see very good quality from California with very good supplies. Sizing continues to run heavy to 88s, 113s, and 138s, although sizing is starting to trend slightly larger as sizing 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 is available. Advanced ordering is recommended for large sizes.

Limes: WATCHLIST As the weather across the country has improved along with the increased demand for the Superbowl, the lime market has strengthened from last week with slightly higher prices. Production continues to transition to the new crop, which will yield predominately small fruit throughout Q1 as large sizes will be scarce. Quality continues to improve; however, we continue to see effects from the recent rain events.

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: WATCHLIST Lettuce supplies and quality look okay. Weights are expected to be lighter than normal due to the blistering and peeling we are seeing from the frost. We are also seeing weak tips. Continuously cool temperatures have kept production volumes a bit behind the forecasted schedule as well as causing harvest delays. We have added this item to the watchlist.

Iceberg VA: Quality and supplies look good, but the cool weather could be an issue in the next few weeks.

Romaine, & Romaine Hearts: WATCHLIST Romaine and Romaine heart supplies are okay. For Romaine, we are starting to see a bit more maturity, but weight may be lighter than usual due to the issues from the frost. We have seen some clear epidermal peel, blistering and weak tips. Heart material is slowly increasing and allowing for lighter greens and yellows to be seen in the finished product. While supplies are currently steady despite slight delays, we are adding this item to the watchlist. The cold mornings could potentially affect quality and supplies next week.

Romaine VA: Quality and supplies are good but could be affected by the cool weather.

Green Leaf and Red Leaf: Overall quality and supplies look good, but the frost is noticeable on the fields and could start affecting supplies.

Eastern and Western Vegetables:

Green Bell Pepper: Good supply available in Nogals and South Florida. Quality is mostly good.

Color Bell Pepper: Good supply available in Nogals and South Florida. Quality 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, Caribes, Serrano and Poblano were good this week. Shishitos are the shortest this week. Supplies are below forecast domestically out of Florida.

Eggplant: Overall supply is good from Mexico; domestic supply is limited. Quality is good.

Slicer Cucumbers: Good supply crossing through Nogales and McAllen as well as Honduras. 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, as does quality out of the east. Vessel delays continue to decrease shelf life. Due to the weather, there is a limited supply of conventional French beans out of Mexico.

Zucchini/Yellow Squash: Good volume and quality available shipping from all locations.

Herbs ESCALATED

Basil, Sage, and Tarragon supplies remain extremely limited, while other herbs also face constraints. Cooler temperatures and high winds continue to impact quality and slow plant growth. However, with temperatures expected to be warm in the coming weeks, conditions should improve, helping to alleviate these challenges. We are seeing limited supplies on Arugula and Cilantro due to frost damage. It is impacting the growth, and we are seeing small uneven bunches along with purple stems and mechanical issues. Prorating is occurring with some growers.

Melons

Cantaloupe: ESCALATED Quality is good with strong netting and brix levels of 10-12%. Sizing will be mostly 9-12 ct with very limited inventory on jumbos. Supply expected to improve over the next 7 to 10 days.

Honeydew: ESCALATED We have FINALLY turned the corner with honeydews as an increase in supplies will be seen this week in Florida officially putting the Force Majeure experienced the past two weeks behind us. The only caveat is sizing is trending towards larger fruit (5/5Js) with few 6/8s coming this week so flexibility of sizing may be necessary. We should see some better availability with at least 6s by Monday though. Honeydew arrivals (as seen below) are clean with solid brix levels in the 11-13% range.

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

Mixed Vegetables

Artichokes: Supplies have improved, and the market is no longer escalating. Quality is okay and continuing to improve.

Asparagus: ESCALATED Caborca/San Luis continues with low volume due to cold temperatures. This should change next week, depending on the weather. Peruvian volume continues to decrease due to quality and seasonality. Cold weather across the country continues to slow markets, even with less production.

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

Broccoli/Broccoli Crowns: Quality and supplies have improved. It is cold in the mornings in Yuma and that is not helping the broccoli grow, but supplies seem to be steady. Floret Mini's are still tight, and some growers are extremely short on those.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality and supplies look good.

Brussels Sprouts: Quality and supplies look good.

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: WATCHLIST Supplies, and quality are good. Weaker textures are still being reported and there is some mechanical damage and occasional bruising. Shelf life is showing overall good quality, but the frost is slowing growth a bit so we may see some supply issues if the weather doesn't warm up soon. We have added this item to the watchlist.

Celery: Quality and supplies are improving. There has been some weak texture reported causing some mechanical damage. Growers are covering contract business, but some growers are short 30ct and have been subbing 24ct. To ensure contracts are covered. Organic Celery is at the Extreme Trigger due to light supplies.

Corn: Stable supply and good quality available this week.

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: WATCHLIST Supply and quality have improved, and the market looks steady but with the cold weather potentially affecting growth, we are going to add this to the watch list.

Green Onions: Supplies and quality look good.

Mushrooms: Supply is stable, and quality is good.

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

Parsley: ESCALATED (Italian & Curly): Supplies and quality have improved.

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 still escalating in some markets. The quality is good, but supplies are still light with some growers. The market remains very active.

Spinach: ESCALATED Supplies and quality are okay. We have seen some reports of weak texture, discoloration and wilting. The market seems to be rising again. And we are keeping a close eye on this item since the frost seems to be affecting most leafy green items.

Snow Peas and Sugar Snaps: ESCALATED Markets remain active, particularly in the West. Guatemalan snow pea and sugar snap production continues to improve, though humidity in growing regions may impact quality. Domestic supply for snow peas and sugar snaps is currently experiencing a gap, while Mexican production remains steady.

Onions:

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. At the moment, 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 in the near future. 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 at the moment, with volume deals on count carton sizes alternating a bit on a weekly basis— meaning one week it will be 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 the majority of growers transitioning to Burbank's 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 Burbank's 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: Harvesting is now in full swing but may slow as a cooler weather pattern remains in place this week. We do expect to see markets remain stable. Quality is excellent.
- Snacking Tomatoes (Cherry, Grape and Medley): Good supply and strong quality available.

Mexico

- Round Tomatoes and Roma Tomatoes: Stable supply and good quality crossing through Nogales and McAllen.

Quality has been good

- Snacking Tomatoes (Cherry, Grape and Medley): 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 120/135 cts. 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: Limited availability

Asian Pears: Peaking in volume. Quality is outstanding.

Cherries: Offshore supplies are steady loading out of Philadelphia.

Tree Fruit: Improving supply on Offshore Peaches, Plums and Nectarines available.

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: Limited supply available this week.