



Weekly Market Review February 20, 2025

Overview

We are hitting a good stride in production out of South Florida on several items, with good quality and availability across multiple commodities. Mixed Hot Peppers, particularly Shishitos and Serrano, remain the lightest in supply. Similar availability and quality are observed through Nogales and McAllen. Markets remain tight on Yellow Squash and Eggplant. The offshore Table Grape season has improved, with stable supply. Melons have also turned the corner, showing excellent volume and quality out of the ports as well as crossing through Nogales. Pineapple availability remains limited across all sizes. After two weeks of limited avocado harvest in Mexico, the market is stronger across all sizes. Due to the current size curve, large fruit remains at a high premium with less availability. Current field conditions are resulting in a high percentage of grade 2 fruit out of Mexico, which is expected to continue. California's harvest also remains low after several days of rain over the past two weeks. Additionally, Mexico's expected crop volume for the remainder of the 2024-2025 crop season, anticipated to end around late June, has decreased by approximately 20%. However, AFM meetings will occur this week, during which updated crop estimates will be reviewed. More details will come next week, but for now, we can plan on the size curve continuing to trend small and the overall market remaining high-priced as weekly volumes for the season continue to track lighter than projections. Colombia's Principal Crop continues, with arrivals focused on the East Coast. The transition to the Traviesa Crop is estimated to begin in a few more weeks with smaller sizes and a lower dry matter percentage. Morning temperatures in Yuma remain chilly, but the warmer weather is on the horizon. The cooler mornings are still contributing to icing as a potential problem for some commodities, but things are improving. We are still dealing with icing and blistering conditions that have been observed on Cilantro, Arugula, Iceberg, Romaine, and other Leafy Greens across the Yuma Valley. Despite the cold mornings, quality has improved for most other wet vegetable items. Even with the freeze/ice, the afternoons have warmed up, and crops are starting to see more growth. Overall, supplies are looking stable. Endive, Escarole, Cilantro, Fennel, and Spinach remain escalated, with supply shortages driving market conditions. Spinach is still 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. Once warmer weather and rain arrives next week, soil temperatures should continue to rise, and conditions should start to normalize. While it will still be a few weeks before things fully level out, better supplies and quality are on the horizon. While the cool weather is moving out, the warm weather will likely attract insects. This will be something that the fields will battle throughout March. Aphids seem to target Arugula, Kale and Cilantro so we will be monitoring those items closely. We will keep an eye on those items and all leafy greens and keep everyone updated on any issues. As a reminder, some growers have items that do not transfer to Yuma, meaning additional fees will apply throughout the Yuma season.









Alert List

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









Watch List

1. Banana and Pineapple
2. Broccolini
3. Arugula
4. Cabbage, Green
5. Cauliflower
6. French Beans
7. Kale
8. Lettuce, Iceberg
9. Lettuce, Romaine
10. Ginger
11. Snow Peas & Sugar Snap Peas
12. Squash, Yellow
13. Eggplant









Weather
OXNARD, CA

Thu 2/20 71° 52°F  Partly Cloudy	Fri 2/21 72° 50°F  Mostly Sunny	Sat 2/22 67° 52°F  Partly Cloudy	Sun 2/23 70° 53°F  Sunny	Mon 2/24 69° 53°F  Sunny	Tue 2/25 74° 55°F  Partly Cloudy	Wed 2/26 75° 56°F  Partly Cloudy	Thu 2/27 68° 53°F  Partly Cloudy
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YUMA, AZ

Thu 2/20 81° 54°F  Partly Cloudy	Fri 2/21 80° 51°F  Sunny	Sat 2/22 82° 50°F  Sunny	Sun 2/23 85° 52°F  Sunny	Mon 2/24 89° 55°F  Sunny	Tue 2/25 92° 60°F  Mostly Sunny	Wed 2/26 93° 61°F  Partly Cloudy	Thu 2/27 92° 60°F  Partly Cloudy
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HERMOSILLO, SONORA

Thu 2/20 86° 52°F  Sunny	Fri 2/21 86° 52°F  Sunny	Sat 2/22 87° 53°F  Sunny	Sun 2/23 92° 55°F  Sunny	Mon 2/24 96° 56°F  Sunny	Tue 2/25 96° 58°F  Partly Cloudy	Wed 2/26 94° 60°F  Partly Cloudy	Thu 2/27 96° 60°F  Partly Cloudy
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JALISCO, NAYARIT

Thu 2/20 81° 58°F  Cloudy	Fri 2/21 81° 54°F  Mostly Sunny	Sat 2/22 83° 56°F  Partly Cloudy	Sun 2/23 83° 55°F  Partly Cloudy	Mon 2/24 84° 53°F  Partly Cloudy	Tue 2/25 83° 53°F  Sunny	Wed 2/26 82° 52°F  Sunny	Thu 2/27 83° 53°F  Sunny
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VIZCAINO, BAJA

Thu 2/20 82° 47°F  Mostly Sunny	Fri 2/21 85° 52°F  Partly Cloudy	Sat 2/22 85° 54°F  Mostly Sunny	Sun 2/23 89° 55°F  Sunny	Mon 2/24 93° 55°F  Mostly Sunny	Tue 2/25 93° 58°F  Partly Cloudy	Wed 2/26 92° 60°F  Partly Cloudy	Thu 2/27 93° 57°F  Partly Cloudy
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CULICAN, SINALOA

Thu 2/20 93° 55°F  Partly Cloudy	Fri 2/21 92° 54°F  Partly Cloudy	Sat 2/22 94° 55°F  Mostly Sunny	Sun 2/23 94° 53°F  Partly Cloudy	Mon 2/24 95° 54°F  Mostly Sunny	Tue 2/25 92° 54°F  Sunny	Wed 2/26 90° 55°F  Mostly Sunny	Thu 2/27 91° 56°F  Partly Cloudy
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IMMOKALEE, FL

Thu 2/20 76° 47°F  AM Clouds/PM	Fri 2/21 74° 53°F  Partly Cloudy	Sat 2/22 78° 55°F  Mostly Cloudy	Sun 2/23 79° 56°F  Partly Cloudy	Mon 2/24 73° 54°F  Showers	Tue 2/25 77° 50°F  Mostly Sunny	Wed 2/26 82° 54°F  Sunny	Thu 2/27 83° 60°F  Mostly Sunny
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Fruits & Vegetables

Avocados: ESCALATED A 56.4M pound harvest was reported for week 7, and 41.8M pounds were shipped to the U.S. Jalisco currently represents 9.2% of the volume sent to the U.S. from Mexico. Mexico's expected crop volume for the remainder of the 2024-2025 crop season, anticipated to end around late June, has decreased by approximately 20%. Small fruit is expected to continue making up the majority of the size curve for the duration of the season- aligning with the adjustment in crop volume. Due to the extended rainy season, there is a high percentage of grade 2 fruit. The Main Crop currently has a dry matter estimate of 31.9%. The USDA continues to restrict packhouse production hours industry-wide, contributing to limited packhouse capacities.

Bananas: WATCHLIST: Banana imports remain light but will improve slowly over the coming weeks 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: Stable supply is available on whites, reds, globes and black varieties, and we hit a stable production cycle on grapes from Peru and Chile. Quality is good.

Berries

Strawberries: In the eastern and midwestern regions, volumes remain steady; however, supplies are limited on the West Coast. Significant rainfall has caused supplies out of the west to be very limited. Due to the rainfall, production volumes are expected to fluctuate over the next few weeks. Once the weather warms and field conditions stabilize over the next few weeks, weekly production increases should resume, with March volumes expected to be higher than usual. The plants continue to display healthy, rich, dark green canopies and strong emerging flower sets, although production gaps may occur in the coming month due to cold temperatures stalling flower development or causing unseen damage. While rain presents short-term challenges, affecting fruit quality, disrupting harvest schedules, and creating unpredictable production patterns—it also offers long-term benefits by controlling mites, leaching excess soil salts, and promoting overall plant vigor. These factors will ultimately support strong fruit production through the spring and summer peak seasons. Daily temperatures out of Mexico have been high, with daytime readings in the high 80s to low 90s and nighttime lows in the mid-40s to low 50s, leading to uneven ripening. We are anticipating potential rain next week, and as production has passed its peak, volumes are expected to decline rapidly toward the end of February through early March. Overall fruit sizes are beginning to drop, as plants show signs of fatigue in the later stages of production. The weather this week out of Florida remains warm and sunny, echoing last week's conditions with daytime highs in the 80s and nighttime lows in the high 50s to low 60s. Forecasts indicate less than an inch of rain this Sunday. The sustained warm weather contributes to steady production improvements, with daily gains in both size and quality. Although peak production is still expected in February, recent challenges—including a hurricane, cold temperatures, rain, and freezing nights—have led to a stunted peak. Next week, slightly cooler temperatures are anticipated, with highs in the 70s and lows in the 40s, which could slow production in the subsequent week. Despite these potential setbacks, pack counts are consistently ranging from 12 to 18 per case, with the fruit maintaining good firmness, color, and flavor, although growers are beginning to observe issues such as over ripeness, soft skin, botrytis, and bruising.

Blackberries: The quality of blackberries remains strong, with medium to large sizes, an attractive sheen, predominantly black color, and good firmness. However, some issues are being observed, including red cell regression, attached calyx, and occasional soft, leaking fruit. Overall volume is steady at a consistent peak through the end of July, although we anticipate a slight decrease in production toward the end of February.

Raspberries: The raspberries exhibit a robust red color with strong firmness, with most berries being medium-sized and occasional larger ones are present. While there is some overripe and crumbled fruit, crews are actively ensuring that these do not make it into the packs. Production volumes remain at a consistent peak through the end of April, although a slight decline is anticipated toward the end of February. Meanwhile, organic production is performing exceptionally well, and as we enter peak production, we expect favorable availability through March.

Blueberries: Overall supplies remain steady. Warm temperatures (highs in the 70s-80s, lows in the mid-40s) out of Mexico are driving a rapid increase in conventional blueberry production, with volume expected to grow week-over-week until a small peak in March. A steady supply is anticipated through the remainder of the year. Overall, the quality remains excellent. Some redberries, soft/leaking fruit, and shriveling are present due to a frost event in late December—early January. Peru has finished production for the season. High temperatures (daytime 80s–90s, nighttime mid-50s) out of Chile have significantly reduced current and future production. Quality remains good. Chile is in its peak domestic shipping period for February, but open market availability will decline sharply after February due to heat-related supply drops. Both organic and conventional blueberries from Chile are expected to be available through March.

Citrus

Oranges: Rain in the Central Valley last week slowed orange harvests, but fruit quality from California remains excellent with very good supplies. Pricing on smaller sizes, 113's and 138's, is firming up as the size structure is switching, but overall market has stabilized.

Lemons: Good supplies and very good quality out of all growing areas in California. Ideal time for promotions.

Limes: ESCALATED ON SOME SIZES The market is steady as production in Mexico has transitioned to the new crop. Current demand is steady but has been impacted by extreme weather events across the country. Rain in the growing areas of Mexico over the past few weeks has led to increased presence of oil spots and styler-end breakdown, which generally appears after repack/sorting while the fruit is in transit. Sizing is running heavier to smaller sizing, which we expect to see throughout the remainder of Q1 as large sizes will be scarce. Delays at the border are impacting trucks crossing into the US from Mexico so loading delays are expected.

Imports/Specialties: California Mandarins, Grapefruit, Cara-Cara, and Blood Oranges are seeing very good quality.

West Coast Lettuce

Iceberg: WATCHLIST Lettuce supplies and quality look good. Weights are still expected to be a bit lighter than normal due to the blistering and peeling we are seeing from the frost, but overall things are improving.

Iceberg VA: Quality and supplies look good.

Romaine & Romaine Hearts: WATCHLIST Romaine and Romaine heart supplies are good. For Romaine, we are starting to see a bit more maturity, but weight may still 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. Supplies are steady and are improving with the warm weather.

Romaine VA: Quality and supplies are good.

Green Leaf and Red Leaf: Overall quality and supplies look good

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: Jalapeño, Caribes, and Poblano were good this week. Shishitos and Serrano Pepper are the shortest this week.

Eggplant: WATCHLIST Lighter supply and quality is mixed from Mexico; domestic supply is limited.

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: Lighter supply available crossing through Nogales. Quality is outstanding.

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

French Beans: Watchlist Steady supply of French beans out of Guatemala, although container delays persist. Limited supply of French beans out of Mexico due to weather.

Zucchini/Yellow Squash: WATCHLIST Good volume and quality available shipping from all locations on Italian; markets are shorter on yellow.

Herbs: ESCALATED Basil supply and quality from Mexico will be marginal due to cold weather, while other herbs, including Sage, Tarragon, and Thyme, are similarly affected. Supply may be inconsistent over the next few weeks, but conditions are expected to improve as temperatures rise. We are seeing limited supplies on Arugula and Cilantro due to frost damage. It is impacting on the growth, and we are seeing small, uneven bunches along with purple stems and mechanical issues. Prorating is occurring with some growers.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Marginal	USA
Basil	Very Limited	Marginal	USA/MEX
Opal Basil	Very Limited	Marginal	USA
Thai Basil	Very Limited	Marginal	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Limited	Marginal	USA/MEX

Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

We have finally moved into fields not impacted by Tropical Storm Sara back in November, so more normal yields are being experienced on both cantaloupe and honeydew. After two months of record pricing levels, markets have started to settle as production becomes more normalized for this time of the year.

Cantaloupe: As first cycle production in Honduras begins to wind down, we will see a brief overlap next week with only Guatemala working by the first week of March. Despite the “wind down” we are seeing good supply available on 9’s and 12’s. We will see less overall volume in coming weeks unlike previous season, which could put upward pressure on markets soon. We are seeing more production from the Zacapa region of Guatemala is providing excellent results. Not only is premium sizing being realized but, as you can see in the pictures below, the fruit has excellent color and averaging 13-15%.

Honeydew: Honeydew supply, especially from Honduras, continues with higher numbers this week; the surplus should last about another week before returning to more normal levels. Similar to the cantaloupe, country of origin is impacting sizing. Honduran fruit has been peaking on larger fruit (5/5Js) while Guatemalan fruit has been seeing more smaller fruit (6/8s). Overall quality has been clean with brix level primarily hitting a range of 11-13%.

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

Mixed Vegetables

Artichokes: Supplies and Quality are both good

Asparagus: ESCALATED Caborca/San Luis volume continues to improve. This trend should continue through the end of March. Peruvian volume is very low due to seasonality. Markets are less active with Valentine’s ads finished.

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

Broccoli/Broccoli Crowns: Quality and supplies look good. Floret Mini’s are still tight, and some growers are still short on those.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality and supplies look okay but some growers are extremely light on supplies. Expect to be held to averages in some markets.

Brussels Sprouts: Quality and supplies look good.

Carrots (JUMBOS, MEDIUMS and CELLOS): The Desert growing regions have started with good supplies and very good quality. Expect steady supplies through the end of the desert season which will run into late April or early May.

Cauliflower: WATCHLIST Supplies, and quality are good. Weaker texture is still being reported and there is some mechanical damage and occasional bruising. Shelf life is showing overall good quality.

Celery: Quality and supplies are improving. There has been some weak texture reported causing some mechanical damage. Growers are covering contract business. Organic Celery is triggered due to light supplies.

Corn: Stable supply and good quality available this week out of Mexico and Florida.

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

Kale: WATCHLIST Supplies have improved, and quality is good, but we are adding it to the watchlist due to the possibility of insect pressure.

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 market are steady.

Green Cabbage: WATCHLIST Supplies and quality look good

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, and the cooler weather has really slowed down the growth.

Parsley (Italian & Curly): ESCALATED Supplies and quality look good

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 escalated in some markets. Quality is good but supplies are still light with some growers. The market remains very active.

Spinach: ESCALATED Supplies and quality are good. We have still seen some reports of weak texture, discoloration and wilting

Snow Peas and Sugar Snaps: Market conditions are trending downward. Guatemalan snow peas and sugar snaps are experiencing good production, although high humidity in the growing regions contributes to quality issues. Production of both snow peas and sugar snaps in Mexico remains steady. Meanwhile, market conditions are trending downward.

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 with 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 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 most 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 February/beginning 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– 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.