

Weekly Market Review

January 17, 2025

Overview

We are watching cold weather invade the South again this week, which could slow production across all categories. Color Peppers, Citrus, and Mixed Hot Peppers are active while tomato quality and supply improve. Green Pepper supply is good, but squash is tighter this week. Mexico will also see a slowdown, with rain and cooler weather expected over the next several days. 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. The 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 substitute outright if there are any shortages. Supply should improve over the next three weeks; pineapple and banana supply will remain snug for the next month at the very least. The avocado industry is still digging its way out of a very deep hole, and the Super Bowl brings the largest demand of the year. Over the last 2 weeks, the industry has been tracking 23% less volume than last year. Availability is limited, and both field and market prices are increasing, and demand continues to be strong. This will be a high-priced Super Bowl, as volumes will be harvested next week to begin moving into position for Weeks 5 and 6. The size curve is unchanged and expected to trend on small fruit for the next few months. In addition, the USDA's restricted packing hours are capping total production in Mexico, contributing to the industry-wide supply shortage. Coming out of the Super Bowl is the earliest a downward market adjustment would be possible. The weather in Yuma has gotten a bit chilly. Winds and morning freeze have become the biggest issues. Harvesting crews have seen some delays. Unfortunately, that means that long-term wind-related damage is a potential, and we could see a decrease in supplies. We are also seeing significant lettuce icing conditions across the Yuma Valley. We have added Lettuce items to the watchlist and will continue to monitor the situation. It looks like we have at least 2 weeks of this kind of weather headed to the valley. Even with the cold mornings, quality and supplies have continued to improve on the majority of the wet veg items. Endive, Escarole, Cilantro, and Fennel are still escalated. Supplies remain an issue on those items, and that is driving the market. Bok Choy and Leeks have stayed at the extreme trigger. Spinach is also still escalated but will likely be back to normal pricing soon. Red Cabbage, Celery, and Brussels Sprouts are also still escalated. Supplies on all cabbage items have improved, but the cold weather is slowing down the plant growth. Red Cabbage should be coming off escalation soon if the supplies are not affected by the weather. Brussels Sprouts are off of escalation with some growers and should be back to normal pricing across the board soon. Some growers are still struggling with supplies since the mornings are still cold, but things are starting to improve. As a reminder, some growers have items that do not transfer to Yuma, so they will have fees throughout the Yuma season.

Alert List









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

Watch List









1. Banana and Pineapple
2. Bell Pepper Red, Yellow and Orange)
3. Broccolini
4. Cabbage, Green
5. Lettuce, Iceberg
6. Lettuce, Romaine
7. Ginger
8. Snow Peas & Sugar Snap Peas

Weather









OXNARD, CA

| Thu 1/16 | Fri 1/17 | Sat 1/18 | Sun 1/19 | Mon 1/20 | Tue 1/21 | Wed 1/22 | Thu 1/23 |
|---|---|---|---|---|--|---|---|
| 67° 46°F | 60° 45°F | 59° 43°F | 59° 45°F | 65° 51°F | 68° 45°F | 65° 49°F | 67° 50°F |
|  |  |  |  |  |  |  |  |
| Sunny | Partly Cloudy | Mostly Sunny | Sunny | Partly Cloudy | Mostly Sunny | Mostly Sunny | Sunny |









YUMA, AZ

| Thu 1/16 | Fri 1/17 | Sat 1/18 | Sun 1/19 | Mon 1/20 | Tue 1/21 | Wed 1/22 | Thu 1/23 |
|---|--|--|--|---|--|---|--|
| 70° 41°F | 69° 39°F | 70° 40°F | 70° 42°F | 69° 44°F | 66° 41°F | 69° 44°F | 69° 43°F |
|  Mostly Sunny |  Sunny |  Sunny |  Sunny |  Mostly Sunny |  Partly Cloudy |  Mostly Sunny |  Sunny |









HERMOSILLO, SONORA

| Thu 1/16 | Fri 1/17 | Sat 1/18 | Sun 1/19 | Mon 1/20 | Tue 1/21 | Wed 1/22 | Thu 1/23 |
|--|--|--|--|---|--|--|--|
| 74° 50°F | 73° 43°F | 76° 46°F | 79° 44°F | 79° 47°F | 79° 47°F | 76° 45°F | 77° 47°F |
|  Partly Cloudy |  Partly Cloudy |  Sunny |  Sunny |  Mostly Sunny |  Mostly Cloudy |  Partly Cloudy |  Sunny |









JALISCO, NAYARIT

| Thu 1/16 | Fri 1/17 | Sat 1/18 | Sun 1/19 | Mon 1/20 | Tue 1/21 | Wed 1/22 | Thu 1/23 |
|--|--|--|--|--|--|--|--|
| 81° 54°F | 79° 54°F | 78° 53°F | 77° 51°F | 75° 51°F | 78° 53°F | 80° 54°F | 80° 53°F |
|  Partly Cloudy |  Partly Cloudy |  Partly Cloudy |  Mostly Cloudy |  Partly Cloudy |  Partly Cloudy |  Sunny |  Partly Cloudy |









VIZCAINO, BAJA

| Thu 1/16 | Fri 1/17 | Sat 1/18 | Sun 1/19 | Mon 1/20 | Tue 1/21 | Wed 1/22 | Thu 1/23 |
|---|--|--|--|---|---|---|--|
| 73° 50°F | 71° 40°F | 74° 45°F | 77° 45°F | 73° 52°F | 73° 50°F | 75° 49°F | 74° 50°F |
|  Mostly Cloudy |  AM Clouds/PM |  Mostly Sunny |  Mostly Sunny |  Partly Cloudy |  Mostly Cloudy |  Partly Cloudy |  Mostly Sunny |

CULICAN, SINALOA

| Thu 1/16 | Fri 1/17 | Sat 1/18 | Sun 1/19 | Mon 1/20 | Tue 1/21 | Wed 1/22 | Thu 1/23 |
|--|--|--|--|--|--|--|--|
| 85° 57°F | 85° 55°F | 83° 49°F | 83° 49°F | 83° 50°F | 84° 52°F | 83° 52°F | 84° 51°F |
|  Mostly Cloudy |  Partly Cloudy |  Partly Cloudy |  Partly Cloudy |  Partly Cloudy |  Partly Cloudy |  Partly Cloudy |  Partly Cloudy |

IMMOKALEE, FL

| Thu 1/16 | Fri 1/17 | Sat 1/18 | Sun 1/19 | Mon 1/20 | Tue 1/21 | Wed 1/22 | Thu 1/23 |
|---|--|---|--|---|--|--|--|
| 67° 54°F | 65° 61°F | 79° 64°F | 81° 53°F | 61° 52°F | 66° 47°F | 63° 50°F | 73° 58°F |
|  PM Showers |  Showers |  AM Clouds/PM Sun |  Showers |  PM Showers |  Showers |  Partly Cloudy |  Mostly Cloudy |

Fruits & Vegetables

Avocados: ESCALATED Last week's total volumes for the U.S. closed at 64.2M pounds, a 78% increase in volume! This is a very exciting number for a market that's been hungry for fruit and hasn't seen a week over 50M pounds since early December. Jalisco currently represents 8.1% of the volume sent to the U.S. from Mexico. Next week is the harvest for Super Bowl promotions, and 73.4M pounds is the estimate. In the field, availability is stronger for small sizes and sizes 48 and larger are in tighter supply. Additionally, markets have continued to increase across all sizes. Due to an extended rainy season, there has been an increase in grade 2 fruit. Volume from Mexico hasn't reached the 70-mil lb. range in a single week since 2023, and expectations are for a more realistic high 60-mil lb. number.

Bananas: WATCHLIST Bananas have tightened up slightly due to cooler and poorer-than-desired weather in the tropics. Import volumes will be increasing back to normal volumes. Overall, bananas are showing good quality. 24ct bananas are showing the most availability at this time. Quality is good.

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 4-6 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: ESCALATED Supplies continue to increase out of multiple growing regions. Santa Maria's weather remains mild, with daytime highs in the high 60s 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, and 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 still running very good, with sizing continuing to run heavy to 88s, 113s, and 138s. 72s and larger remain in lighter supply although the 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 sizing is available. Advanced ordering is recommended on large sizes.

Limes: ESCALATED - The lime market has stabilized as demand has been impacted by extreme weather events across the U.S. Production continues to transition to new crop, which will yield predominately small fruit throughout Q1. **Large sizes will be scarce.** Fruit color/quality has much improved, however, recent rain events will likely affect quality. Defects will likely appear after repacking/sorting while the fruit is in transit. We expect to see availability continue to decline due to low temperatures, which is compatible with seasonal trends with higher pricing.

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 good. Weights have also improved and are back to normal for most growers. Continuingly 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 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 yellows to be seen in the finished product. While supplies are currently steady despite slight delays, we are adding this item to the watchlist.

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

Green Leaf and Red Leaf: Overall quality and supplies look good. Weights and sizing look ideal.

Eastern and Western Vegetables:

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

Color Bell Pepper: Markets are beginning to ease back as crossings increase in Nogales and McAllen. Quality is 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 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** Eastern markets continue to show improvement, while western markets remain relatively steady. Vessel delays in the east have impacted self-life, reducing product longevity. Additionally, French bean supplies from Mexico are limited due to adverse weather conditions.

Zucchini/Yellow Squash: Lighter volume due to the cooler weather has pushed fob prices higher this week. Overall quality is good.

Herbs

Demand was very high during the holidays 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 3-5 days or so for sunshine to return.

| HERB | SUPPLY | QUALITY | COUNTRY OF ORIGIN |
|-----------------|---------|----------|-------------------|
| Arugula | Steady | Marginal | USA |
| Basil | Steady | Steady | USA/MEX |
| Opal Basil | Steady | Steady | USA |
| Thai Basil | Steady | Steady | USA/MEX |
| Bay Leaves | Steady | Steady | USA/COL |
| Chervil | Limited | Limited | USA |
| Chives | Steady | Steady | MEX |
| Cilantro | Steady | Steady | 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 | Steady | Steady | USA |
| Savory | Steady | Limited | USA |
| Sorrel | Steady | Steady | USA |
| Tarragon | Steady | Steady | MEX |
| Thyme | Steady | Steady | USA |
| Lavender | Steady | Steady | USA |
| Lemon Thyme | Steady | Steady | USA |
| Lime Leaves | Steady | Steady | USA |

Melons

Both cantaloupe and honeydews have reached "demand exceeds supply" levels due to the effects that followed Tropical Storm Sara in the fall. Although we are seeing lower yields on both commodities, we are in better condition on cantaloupe than the honeydew. We began advising three weeks ago of a volatile January and expect it to continue. We are recommending scaling back portion sizes, subbing to watermelon or other fruit items to limit the use of honeydew at this time.

Cantaloupe: ESCALATED Quality is good with strong netting and brix levels of 10-12%. Sizing will be mostly 9-12 ct; jumbo fruit will not be available. Demand will exceed through January as the rain from Tropical Storm Sara has impacted fields in Honduras and Costa Rica that were scheduled to begin harvesting in 2-3 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 until steady arrivals and a good balance of fruit are available.

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 fight this for several weeks; our suppliers are asking for flexibility in sizing and subs where necessary to maintain service levels, but we do expect to see significant pro-rates and close to a Force Majeure declaration next week. If there is a need to sub, there should be a good supply of watermelon.

Watermelon: Lighter 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 escalated. Quality is okay and continuing to improve.

Asparagus: ESCALATED Caborca/San Luis continues with low volume due to cold temperatures. This should change at the end of next week. Peruvian volume continues to decrease due to quality and seasonality. Cold weather across the country has slowed 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.

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

Brussels Sprouts: ESCALATED 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: Supplies have improved, but quality is just okay. Weaker texture is still being reported and there is some mechanical damage and occasional bruising. Shelf life is showing overall good quality, though.

Celery: ESCALATED: Quality and supplies are improving. There has been some weak texture reported causing some mechanical damage. Growers are still able to cover contract business. Organic Celery is at the Extreme Trigger due to light supplies.

Corn: Good supply and quality available this week. Please note that winter corn will have a smaller barrel and length this time of year as well as see a lesser mature kernel. All due to Mother Nature; cooler temps and less sun impacts the maturity of the crop.

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 market 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 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 improving. This item should be off escalation in all markets soon.

Snow Peas and Sugar Snaps: ESCALATED Markets in the western region remain active, while eastern markets remain steady. Guatemalan snow pea production continues to show improvement, alongside better sugar snap production this week. Domestic supplies of both snow peas and sugar snaps are experiencing gaps, while Mexican production remains stable.

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. 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 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 the majority of 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:** Harvesting has ramped up and supply is improving daily. We expect to see a more normal market by the middle of next week. Quality is excellent. We are dealing with cooler weather that can impact overall production.

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: Good supply available this week.

Asian Pears: Peaking in volume. Quality is outstanding.

Tree Fruit: Improving supply on 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.