

Weekly Market Review

January 9, 2025

Overview

We are watching cold weather invade South Florida this week, which could slow production across all categories. Color Peppers, Citrus, and Mixed Hot Peppers are active, while tomato supply out of Immokalee will slow down. However, we expect stable production going forward. 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. The holiday season has significantly impacted U.S. avocado inventories, resulting in the lowest standing inventory seen in several years. For comparison, even the week-long halt of Mexican avocado shipments following the 2022 Super Bowl left more inventory available than the current level—33.8M pounds at that time versus 33.4M pounds now. Last week's harvest concluded at 36.1M pounds, reflecting a 26% decline compared to two weeks prior. Looking ahead, projections for U.S. avocado supply over the next two weeks are estimated at 69 and 70M pounds, respectively. However, actual numbers are expected to close lower, likely in the mid-60M pound range. These trends highlight the dynamic nature of current market conditions and the need for ongoing adjustments to meet demand. In addition, the USDA's restricted packing hours are capping total production in Mexico, which has contributed to the industry-wide supply shortage. The curve continues to be heavy on small sizes, with less availability on large sizes. The industry expects demand to remain high through early February, with many upcoming promotion opportunities. Relief on Wet Veg items has finally started to happen! 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. Broccoli and Green Cabbage are no longer escalated, and quality and supplies have really improved. Cauliflower is no longer escalated, but quality is still okay. 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. Celery sizes are trending at 30ct size. Supplies on all cabbage items are improving. Red Cabbage should be coming off escalation soon. 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.

Alert List









- Asparagus – **ESCALATED**
- Avocados – **ESCALATED**
- Bell Pepper (Red, Yellow and Orange) – **ESCALATED**
- Bok Choy – **EXTREME**
- Brussel Sprouts-**ESCALATED**
- Cabbage-Red-**ESCALATED**
- Celery – **ESCALATED**
- Cilantro – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Hot Peppers (Habanero, 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. Broccolini
2. Ginger
3. Snow Peas & Sugar Snap Peas
4. Tomatoes (Rounds, Romas and Snacking Tomatoes)

Weather









OXNARD, CA

Thu 1/9	Fri 1/10	Sat 1/11	Sun 1/12	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16
74° 52°F	68° 44°F	66° 50°F	65° 47°F	63° 50°F	68° 52°F	66° 48°F	61° 45°F
							
Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Sunny	Partly Cloudy	Mostly Sunny









YUMA, AZ

Thu 1/9	Fri 1/10	Sat 1/11	Sun 1/12	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16
71° 48°F	68° 39°F	70° 49°F	67° 39°F	66° 43°F	69° 46°F	71° 45°F	71° 45°F
							
Sunny/Wind	Sunny	Sunny	Sunny	Partly Cloudy	Sunny	Mostly Sunny	Sunny









HERMOSILLO, SONORA

Thu 1/9	Fri 1/10	Sat 1/11	Sun 1/12	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16
69° 47°F	71° 44°F	74° 41°F	74° 40°F	76° 43°F	79° 49°F	79° 51°F	77° 48°F
							
Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy









JALISCO, NAYARIT

Thu 1/9	Fri 1/10	Sat 1/11	Sun 1/12	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16
64° 52°F	66° 46°F	65° 47°F	70° 51°F	73° 54°F	75° 56°F	80° 56°F	80° 57°F
							
Rain	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny









VIZCAINO, BAJA

Thu 1/9	Fri 1/10	Sat 1/11	Sun 1/12	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16
70° 48°F	75° 48°F	72° 47°F	80° 49°F	81° 55°F	84° 59°F	88° 60°F	88° 61°F
							
AM Clouds/PM	Mostly Sunny	Sunny	Sunny	Mostly Cloudy	Cloudy	Partly Cloudy	Mostly Cloudy

CULICAN,SINALOA

Thu 1/9	Fri 1/10	Sat 1/11	Sun 1/12	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16
73° 49°F	74° 48°F	75° 47°F	79° 48°F	80° 52°F	81° 57°F	85° 58°F	83° 59°F
							
Mostly Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy

IMMOKALEE, FL

Thu 1/9	Fri 1/10	Sat 1/11	Sun 1/12	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16
64° 43°F	76° 60°F	72° 49°F	74° 58°F	81° 58°F	70° 45°F	66° 42°F	68° 39°F
							
Sunny	Mostly Sunny	AM Showers	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Mostly Sunny

Fruits & Vegetables

Avocados: ESCALATED Markets saw a significant increase over the past two weeks due to lower overall harvests caused by the holidays. A 42M pound harvest was reported for week 1, and 31.9M pounds were shipped to the U.S. Jalisco currently represents 11.2% of the volume sent to the U.S. from Mexico. The Main Crop currently has a dry matter estimate of 28.4%. In the field, availability is stronger on small sizes, and sizes 40 and larger are in tighter supply. Due to an extended rainy season, there has been an increase in grade 2 fruit. Harvest has picked back up as the industry works to replenish inventories after two consecutive holiday weeks. The USDA has imposed restricted packhouse production hours industry-wide, contributing to limited packhouse capacities.

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

Pineapples: Supply will remain tight due to low harvest numbers. Overall quality is good. Flexibility on 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 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 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 sizing is available. Advanced ordering is recommended on large sizes.

Limes: ESCALATED - We have seen a significant change in the Lime availability over the past few weeks. There has been persistent rain in the growing areas of Mexico, which has curtailed harvesting and packing for the grower community. We are also seeing smaller sizing, running heaviest to 200's and smaller with 175's and larger being scarce; we expect this to last through the month of January and into February. In addition, while the new crop shows improved fruit color and quality, the recent rain has raised concerns about potential issues like oil spots and styler-end breakdown, which often become apparent during transit after sorting and packing. With the overall availability declining and the potential for quality concerns combined with increased demand during the NFL Playoffs/Super Bowl expected to be high, we expect stronger markets as we approach February.

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 look good. Weights have also improved and are back to normal for most growers.

Iceberg VA: Quality and supplies look good.

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 yellows 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 look ideal.

Eastern and Western Vegetables: *We expect to see some slow-down in production as cooler weather and rain is expected to hit some of the major growing regions in South Florida as well as Mexico.*

Green Bell Pepper: Markets eased up this week with good supply in Nogals and South Florida. Quality is mostly good.

Color Bell Pepper: ESCALTED 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. Quality 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, Caribes, Serrano and Poblano were good this week. Fresnos and Shishitos are the shortest this week. We still expect supply GAPS in the East due to the cooler weather.

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 Markets are expected to remain active for the next few weeks. Guatemalan production continues to improve, and so does quality. However, vessel delays have decreased shelf life. Limited supply of French beans out of Mexico due to weather.

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 7-10 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 volatile January and expected 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 9-12ct; 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 next week.

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

Mixed Vegetables

Artichokes: Supplies are 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. Markets are active 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 the weather is improving so the supplies are also getting better. 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: 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. The weather in Yuma is continuing to improve, so expect quality to get better over the next few weeks.

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. Organic Celery is at the Extreme Trigger due to light supplies.

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 market are steady.

Green Cabbage: Supplies and quality have improved, and the market looks steady.

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 supplies in some markets are 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 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 Guatemalan snow pea production continues to show improvement, with sugar snap pea production also trending upward. However, domestic supply for both snow peas and sugar snaps is experiencing gaps, leading to less activity in these markets. Mexican production remains slightly steady, and the market for Mexican-grown snow peas and sugar snaps continues to be active.

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: *We expect to see some slow-down in production as cooler weather and rain is expected to hit some of the major growing regions in South Florida as well as Mexico.*

East Coast

- **Round and Romas Tomatoes: WATCHLIST-** 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 watching a cold front that will impact the area later this week which could slow down production for the following week.
- **Snacking Tomatoes: WATCHLIST** - 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.

Mexico

- **Round Tomatoes: WATCHLIST-** New crop available and pricing is down this week. Quality has been good.

- **Roma Tomatoes: WATCHLIST** – Markets are hanging in there but expected to drop this week. Supply and quality are good.
- **Grape Tomatoes: WATCHLIST-** Improving supply and poor demand have put downward pressure on price this week. Supply is expected to improve daily over the next week. Quality is good.
- **Cherry Tomatoes and Medley Tomatoes: WATCHLIST** 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: 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.