

## Weekly Market Review

February 6, 2026

### Overview

#### ***Extreme Weather Alert***

***Historical cold weather hit Florida over the weekend and has impacted the entire growing community; we expect to see significant crop losses on Celery, Tomatoes, Bell Peppers, Berries, Squash, Corn and Slicer Cucumber to name a few. Some areas of Florida recorded temperatures below 30 degrees for multiple hours over multiple days. We are working with the grower community assessing damages and outlooks for the next several weeks, possibly months in some cases.***





Production is lighter out of Mexico, and we are seeing strong demand with a lot of mixed quality across all commodities. In the short term, we will see tighter markets on some Hot Peppers, Bell Peppers, Squash, and Tomatoes. We are also seeing logistics challenges start to impact shipping lanes, as trucks are short, either stuck in last week's weather or just generally short due to high demand, which will further complicate an already tight market. Table Grape supply is steady as offshore volume continues to be strong, with good supply on Reds, while Green varieties are behind and are the shortest. Quality has been outstanding! The Lime market has eased back some, and large-sized fruit availability has improved. We still expect volatility through Q1, despite the current conditions of the market. Banana supplies are expected to tighten going into the new year, with challenges anticipated on the spot market as growers navigate increased global demand, combined with virus-related and economic pressures in tropical growing regions.

We are seeing better arrivals on Cantaloupes and Honeydews from Guatemala this week. Quality has been holding up nicely, with good brix levels on both. Pineapple availability has improved slightly but remains limited, and shippers are asking that we continue to be flexible on Pineapple sizes. Avocado volume remains strong, as production made a final push for the Super Bowl. The current size profile continues to favor medium and large fruit, while small sizes are becoming more limited as the season progresses. Lenticel is still present but is typical for this time of year due to rain. The Colombia season is going strong, with limited volume currently landing in the U.S.

Seasonal strawberry transitions across key growing regions, combined with elevated Valentine's Day demand, continue to keep supplies tight in the near term. While volumes are beginning to build in select

areas, cold weather impacts in Florida and the winding down of peak harvests in Mexico are limiting overall availability. Production is ramping up out of Baja with improving conditions, and Central Mexico volumes remain steady but are tapering following recent peak harvests. Florida output remains significantly reduced following recent frost events, with recovery expected as warmer weather returns. Markets are expected to remain firm to elevated in the short term, as demand continues to outpace supply.

Record-setting high temperatures in Yuma, coupled with uncooperative weather patterns, have significantly impacted grower operations. These adverse conditions have led to widespread mildew issues affecting various lettuce types (Romaine, Iceberg, and Green Leaf) and all Tender Leaf items, consequently limiting harvestable acreage. Furthermore, morning frosts are expected to further constrain supplies on select commodities. Spinach remains at an extreme trigger level, and supplies remain limited. Arugula and Spring Mix are also experiencing adverse effects. Customers should anticipate quality challenges, tight supplies, potential prorates, and shortened shelf life across Lettuce and Tender Leaf items. These conditions are projected to persist through at least mid-February. The lettuce market is currently at an extreme level, with considerably tightened supplies and anticipated reductions in case weights. Market volatility is expected to continue due to ongoing mildew damage and erratic weather significantly affecting both quality and availability. Industry-wide supplies of Carrots, Celery, and Green Onions remain extremely limited, with prorates likely for all three. Green Onion availability is expected to remain tight, with full recovery not anticipated until mid-February. Celery supplies continue to be constrained by storm-damaged fields, resulting in substantial acreage loss. Whole Celery will be held to strict averages, while VA Celery packs may face prorates ranging from 10–15%. Celery supply improvements are not expected until mid-February. Carrot supplies are also being held to strict averages, with prorates anticipated for Cellos and Jumbos. Recent rainfall has heavily impacted harvesting, and persistent fog has limited necessary sun exposure for field drying. These conditions are forecasted to persist for the next two to three weeks. Brussels Sprouts supplies have begun to show improvement, with industry-wide availability increasing, although some growers are still adhering to averages. Cilantro remains very tight, with strict averages and potential prorates in place. Broccoli is at an extreme trigger level, and Cauliflower has also reached the extreme level across all sizes. Growers are reporting issues such as pin rot, water spotting, and smaller sizing, all contributing to limited supplies. Anise/Fennel, Leeks, and Napa Cabbage also remain escalated, with ongoing quality and supply concerns. We are closely monitoring mildew pressure and weather-related impacts and will provide further updates as new information becomes available. As warmer afternoons are expected, and morning frost becomes more prevalent, intermittent supply gaps should be anticipated. With the Yuma season approaching its conclusion, growers predict it will finish two weeks ahead of schedule. Consequently, the market is likely to experience considerable instability in crop availability during this period. We will continue to keep you informed with timely updates.

For most, if not all, citrus varieties, smaller sizes are in limited supply. Some suppliers are seeing good Lemon availability across California (including Oxnard) and domestic growing regions like the Central Valley, Ventura County, Coachella Valley, and Yuma, with fruit leaning toward a Fancy grade and peaking on 140s and larger, though 165/200s are a bit snug, and smaller counts for bags are firming up. Meanwhile, others are reporting that while overall Lemon supply is in good shape, small sizes are becoming tighter. For Navel Oranges, California manifests are peaking on 88s, with 88–138s still a little snug, and 113/138s unavailable, which is putting pressure on the 88s, so be prepared for offers of 72s. Good supplies are available on 72s and larger, with a recommendation to size up. Some suppliers have

Vals available in Texas, peaking on 72/88s. Mandarins are slowly improving in supply, with California suppliers reporting the crop is peaking on larger sizes (12/15/18s) and advising to call for availability. Cara Cara availability mirrors the Navel situation, with some sources showing peaking on 72/88s and others seeing larger fruit, with 113/138 scarce. Minneolas are being promoted for large sizes, with some suppliers reporting all sizes available, while others say small sizes are tight. Blood Oranges are available, with large sizes on hand. Pummelos have good volume in 6/8/10s and are eating very well. California Rio Red Grapefruits are now available but tight on 36/40 Fancy (Choice is available), while Texas Rio Reds are shipping and generally peaking on 48/36, with the largest sizes snug. There is a continued push for XXL Navels, Lemons, Cara Caras, Bloods, Mandarins, Pummelos, and Minneolas, alongside domestic Meyer Lemons available to load.

### **Alert List**

- Asparagus – **ESCALATED**
- Bok Choy – **ESCALATED**
- Boston/Butter Lettuce – **ESCALATED**
- Blueberries – **EXTREME**
- Broccoli/Florets/Crowns– **EXTREME**
- Broccolini – **ESCALATED**
- Brussels Sprouts – **EXTREME**
- Brussels Sprouts VA – **EXTREME**
- Cauliflower – **EXTREME**
- Celery/Celery Sleeved – **EXTREME**
- Cilantro – **ESCALATED**
- Green Beans – **EXTREME**
- Fennel, Anise – **ESCALATED**
- Hot Pepper: Red Fresno, Habanero and Shishito – **ESCALATED**
- Leeks – **ESCALATED**
- Lettuce – **EXTREME**
- Lettuce Cello/Wrapped – **EXTREME**
- Limes – **ESCALATED**
- Napa – **ESCALATED**
- Green Onions – **EXTREME**
- Parsley Italian – **ESCALATED**
- Romaine/Romaine Hearts-**ESCALATED**
- Spinach – **EXTREME**
- Snow Peas & Sugar Snap Peas – **ESCALATED**
- Strawberries – **ESCALATED**
- Sweet Corn – **ESCALATED**
- Tomatoes (Rounds, Romas and Snacking Tomatoes)
  - Mexico: **ESCALATED** and Florida: **EXTREME**
- Tomatillos – **ESCALATED**
- Warm Veg Category (Florida) Cor, Beans, Cucumber, Soft Squash, Bell Pepper, Eggplant – **EXTREME**
- White Asparagus – **ESCALATED**

### **Watch List**

1. Bananas
2. Cabbage, Red
3. French Beans
4. Herbs
5. Small Lemons
6. Pineapple
7. Ginger
8. Melons – Cantaloupe and Honeydew
9. Raspberries
10. Small Oranges (138/113/88)

### **Weather** **YUMA, AZ**

Thu 2/5	Fri 2/6	Sat 2/7	Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12
80°   51°F	81°   54°F	81°   55°F	86°   55°F	86°   57°F	80°   55°F	75°   52°F	74°   51°F
 Cloudy	 Mostly Sunny	 Partly Cloudy	 Sunny	 Mostly Sunny	 Mostly Cloudy	 Partly Cloudy	 Mostly Sunny

**OXNARD, CA**

Thu 2/5	Fri 2/6	Sat 2/7	Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12
82°   58°F	68°   51°F	67°   55°F	74°   54°F	71°   54°F	64°   50°F	61°   49°F	66°   49°F
 Mostly Cloudy	 Mostly Cloudy	 Mostly Sunny	 Sunny	 Cloudy	 Mostly Cloudy	 Showers	 Mostly Sunny

**CULIACAN, SINALOA**

Thu 2/5	Fri 2/6	Sat 2/7	Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12
93°   61°F	92°   63°F	90°   64°F	88°   63°F	84°   56°F	87°   55°F	88°   55°F	88°   54°F
 Partly Cloudy	 Partly Cloudy	 Mostly Cloudy	 Cloudy	 Partly Cloudy	 Sunny	 Sunny	 Mostly Sunny

**HERMOSILLO, SONORA**

Thu 2/5	Fri 2/6	Sat 2/7	Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12
88°   57°F	90°   58°F	88°   56°F	86°   57°F	86°   57°F	88°   57°F	86°   56°F	80°   54°F
 AM Clouds/PM	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Mostly Sunny	 Mostly Sunny	 Partly Cloudy	 Mostly Sunny

**JALISCO, NAYARIT**

Thu 2/5	Fri 2/6	Sat 2/7	Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12
83°   57°F	83°   58°F	81°   57°F	81°   59°F	78°   56°F	80°   54°F	80°   53°F	81°   52°F
 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Mostly Cloudy	 Mostly Sunny	 Sunny	 Sunny

**VIZCAINO, BAJA SUR**

Thu 2/5	Fri 2/6	Sat 2/7	Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12
93°   62°F	92°   64°F	90°   64°F	89°   64°F	87°   59°F	89°   56°F	89°   57°F	89°   56°F
 Partly Cloudy	 Mostly Sunny	 Mostly Cloudy	 Cloudy	 Mostly Cloudy	 Sunny	 Mostly Sunny	 Sunny

**PLANT CITY, FL**

Thu 2/5	Fri 2/6	Sat 2/7	Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12
57°   36°F	64°   50°F	71°   39°F	71°   42°F	75°   46°F	79°   52°F	81°   54°F	83°   55°F
 AM Clouds/PM	 Sunny	 Sunny	 Sunny	 Sunny	 Mostly Sunny	 Mostly Sunny	 Sunny

### IMMOKALEE, FL

Thu 2/5	Fri 2/6	Sat 2/7	Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12
61°   38°F	66°   49°F	76°   43°F	76°   45°F	78°   47°F	81°   51°F	82°   53°F	85°   55°F
 AM Rain	 Sunny	 Sunny	 Sunny	 Sunny	 Mostly Sunny	 Mostly Sunny	 Sunny

### Fruits & Vegetables

**Tariff Update:** *President Trump has officially confirmed that tariffs under the USMCA (United States–Mexico–Canada Agreement) will not be implemented on fresh produce from Canada and Mexico. As such, shipments from these two countries will remain unaffected. However, tariffs will be removed over the next two weeks, based on their arrival time in the United States on items such as Bananas, Coffee and Pineapple to name a few key items. Tariffs will remain in place on certain items and countries such as Colombia until new trade agreements are reached.*

**Avocados:** Mexico had 76-million-pound harvest for week 5, with 70.8 million pounds shipped to the U.S. Sizing continues to peak toward 48s and 60s count, while dry matter has climbed to 31%. Demand is expected to remain strong as we prepare for the biggest avocado consumption day of the year, the Super Bowl.

**Bananas: WATCHLIST** Banana supply will begin to tighten over the coming weeks as global demand increases and production in the tropics steadily declines. A combination of virus pressure, low yields, and increasing production costs has placed significant strain on this staple commodity. Overall, banana quality remains very good, and supply is adequate. The key to navigating the coming year will be consistency in supply, consistent ordering patterns, and staying proactive to address any potential issues that could impact the program.

**Pineapples: WATCHLIST** The pineapple market has begun to settle slightly but remains tight. Demand continues to be high, keeping pricing stable. Contracts continue to maintain integrity; however, flexibility on sizing will be required to ensure supply chain stability. Overall, quality and taste are good.

**Table Grapes:** Quality is outstanding, and Brix are hitting the high teens. We seem to be in a good stride with stable availability on all three colors. Green varieties available: Sweet Globes. Red varieties: Red Globes, and Sweet Flavor. There are also generic varieties on all three colors available this week.

### Berries

**Strawberries: ESCALATED** Demand continues to outpace supply as seasonal transitions shift production across key growing regions, along with increased demand tied to Valentine’s Day. While volumes are beginning to build in select areas, recent cold weather impacts in Florida and the decline of peak harvest periods are keeping overall availability tight in the near term. In Oxnard and Santa Maria, the summer-planted fall crop is rapidly winding down as the season comes to a close. Fortunately, the fall-

planted spring crops in both regions are coming into production at an ideal time, helping support steady supplies through the winter months. Overall quality remains good, with volumes expected to increase gradually as warmer, drier weather returns. Out of Baja, both conventional and organic production are ramping up, with volumes forecast to increase week over week as warmer; drier conditions persist in the near-term forecast. Central Mexico production remains steady. Still, it has begun to taper off following peak volumes over the past month, while overall quality has continued to hold up well. Florida production has declined significantly following frost events over the past five days. Volumes are expected to remain very low for the next several weeks but should begin to recover as weather conditions return to more normal, warmer patterns.

**Blackberries:** Production continues in Central Mexico and Baja with good overall availability. Quality remains good, though some softness and occasional red cell or color reversion are being observed as a result of recent heat, rain, and humidity.

**Raspberries: WATCHLIST** Production remains active in Central Mexico and Baja, though supplies have tightened as crops move past seasonal peak volumes, resulting in reduced availability. Overall quality remains good; however, some instances of soft or overripe fruit are being reported due to recent heat, rainfall, and elevated humidity in the growing regions.

**Blueberries: EXTREME** Production remains active in CMEX (Central Mexico), though supplies are tightening as volume trends down from seasonal peak levels. Mexican quality and sizing continue to perform well, and CMEX blueberry quality is reported to be significantly stronger than offshore blueberry offerings currently in the market.

### Citrus

**Limes: ESCALATED** Supply steady out of Mexico, Columbia and Peru. Size profile continues to be heavy to the smaller fruit as of this week. As we get deeper into the new crop, we are starting to see more larger fruit out of Mexico due to the rain in Southern Mexico. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability is expected through March.

**Small Citrus: WATCHLIST** Small fruit is very tight across the board. Expect to be subbed for larger sizes.

### West Coast Lettuce

**Iceberg: EXTREME** Lettuce quality and supplies are just okay, and weights will be light. The market is active, and weather has affected both harvesting and quality. Growers expect the market to continue to rise due to yields being low because of mildew damage and cap leaves. Quality will be hit or miss. Shortened shelf-life issues should be expected. Iceberg is now at the Extreme Trigger.

**Iceberg VA: ESCALATED** Quality and supplies are just okay. We have seen reports of short shelf life and mildew in bags.

**Romaine & Romaine Hearts: ESCALATED** Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, fringe burn, light weights and mildew on the outer leaves. Growers are beginning to hold to averages. For the hearts, very little heart material is available.

**Romaine VA: ESCALATED** Quality and supplies are okay. We have seen more core in the bags and some mildew.

**Boston/Butter Lettuce:** Quality and supplies are good. Mildew and fringe burn pressure have been observed.

**Green Leaf, Better Burger and Red Leaf:** Quality is good, and supplies have improved. Mildew and fringe burn pressure persist, and carton weights remain light, though conditions are improving.

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### ***Extreme Weather Alert***

***Historical Cold weather hit Florida over the weekend and has impacted the entire growing community; we expect to see significant crop losses on Celery, Tomatoes, Bell Peppers, Berries, Squash, Corn and Slicer Cucumber to name a few. Some areas of Florida recorded temperatures below 30 degrees for multiple hours over multiple days. We are working with the grower community assessing damages and outlooks for the next several weeks or months in some cases.***

**Green Bell Pepper: EXTREME** Better supply out of Mexico this week and quality is very good. Very short out of South Florida. We will be assessing the impacts of the extreme cold weather that spread across the major growing regions this past weekend. We do expect to see major losses and supply issues over the coming weeks.

**Color Bell Pepper:** Lighter volume due to cooler weather. Overall quality will remain good out of McAllen and Nogales.

**Mini Sweet Pepper:** Supply was lighter this week due to the cooler and wet weather in Culiacan. Quality remains good.

**Mixed Chili Pepper: ESCALATED** Supplies are good out of Sinaloa and Sonora. Markets will be shorter this week on Habanero and Shishito Pepper. We hope to see improvement next week on the short items. We do anticipate shorter availability on Anaheim and Poblano as Lent approaches; these items are a staple for stuffing with cheese and crab meat during the Holy season.

**Tomatillo: ESCALATED** Supply turned and got very short due to heavy rains this past week. Market volatility is expected through the next 10 to 14 days. We do expect to see very short supply on peeled tomatillo in particular over the next three weeks.

**Eggplant: EXTREME** Domestic supply is very light this week out of Florida due to the cold weather while crossings through Nogales remain strong. Best quality is out of Mexico. We need to assess the impacts of the extreme cold weather that spread across the growing regions throughout the state this past weekend. We do expect to see major losses and supply issues over the coming weeks.

**Slicer Cucumbers ESCALATED:** Supply crossing through Nogales and McAllen was lighter this week due to cooler weather. Honduras will start shipping over the 7 to 14 days. We need to assess the impacts of

the extreme cold weather that spread across the growing regions throughout the state this past weekend. We do expect to see major losses and supply issues over the coming weeks.

**English Cucumbers:** Lighter supply and moderate demand have pushed pricing higher this week out of Nogales and McAllen. Quality is good.

**Pickles:** Lighter crossings through Nogales and McAllen. Quality is good.

**Green Beans EXTREME:** Supply will be extremely short out of Florida due to last week's freeze and expect to see volatility over the next several weeks as growers assess the heavy losses. Markets jumped several dollars, and quality is fair on what is available. Mexico is also seeing lighter availability due to cooler weather slowing down production. High demand has also put upward pressure on FOB pricing out of Nogales.

**French Beans: WATCHLIST** This continues to present a logistical challenge. While production in Guatemala remains decent, vessel delays into East Coast ports are creating inconsistent availability. Out of Mexico, French bean supplies are fair overall, though cooler temperatures are impacting yields.

**Zucchini/Yellow Squash: EXTREME** Supply very short in Florida and lighter crossing through Nogales due to cooler weather pushing markets higher. Best quality is out of Mexico. We need to assess the impacts of the extreme cold weather that spread across the growing regions throughout the state this past weekend. We do expect to see major losses and supply issues over the coming weeks.

**Herbs: WATCHLIST** Basil and rosemary production and quality from Colombia continue to be impacted by heavy rainfall, along with ongoing USDA holds and fumigation delays. Imported chervil supplies remain limited from Ecuador. Out of Mexico, basil supply and quality have been inconsistent due to cooler weather, with occasional tip burn present during the winter months. Arugula and Cilantro are extremely limited from some growers and prorates should be expected.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Limited	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	Limited	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	Limited	Limited	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 WATCHLIST**

**Overview:** The winter storm that hit most of the U.S. has been a small blessing for melons. The lack of demand helped both Cantaloupe and Honeydew supplies. The expected production gap due to changing growing regions in a couple of weeks will most likely be held off due to the storms.

**Cantaloupe:** There is a good mix of 9/12s available, while smaller fruit 12 and 15s are slowing and starting to rebound. Quality overall continues to be good. Brix levels mostly range from 12-14%.

**Honeydew:** Honeydew production on 8ct remains limited. Flexibility on sizing will be required during this period. Quality has been good and improving with Brix levels at 12-13%.

**Watermelon:** The market on seedless melons have increased with less Mexican production. Cooler temperatures in Guatemala have seen watermelon production drop significantly and a shift in size from 45's to 36's. The freezing temperatures in Florida will likely play a role in early production set to start at the end of the month.

### **Mixed Vegetables**

**Artichokes:** Quality and supplies are both good. Large sizes are still limited but supplies are improving.

**Asparagus: ESCALATED** We are currently navigating a production gap between regions. The Peruvian season is wrapping up quickly, while the transition to Mexico's Caborca region has slowed due to recent cold temperatures and rainfall in Sonora. As a result, overall supplies are tighter than normal. We expect the market to remain active with elevated pricing over the next 7 to 10 days, until warmer weather allows Caborca volumes to return to more typical levels.

**Bok Choy: ESCALATED** Quality and supplies are okay.

**Broccoli Florets/Broccoli Crowns: EXTREME** Quality is okay, and supplies have tightened up. The rain and the warmer weather that Yuma experienced has led to quality issues that will remain for the next few weeks. Reports of browning, pin rot continue. Growers are holding to strict averages for now but prorates should be expected.

**Broccolini and Sweet Baby Broccoli: ESCALATED** Quality is good, but supplies are extremely limited with most growers. Weather has affected harvesting and quality. Growers are holding to strict averages, when possible, but prorates should be expected. The market is escalated due to limited supplies.

**Brussels Sprouts: EXTREME** Supplies are still limited but are improving. We are still combating insect pressure and internal browning. The market remains at the extreme trigger, but we should start to see some relief in the next 2 weeks. Growers are holding to averages for a bit longer.

**Carrots (JUMBOS, MEDIUMS and CELLOS):** Due to continued rain events, supplies are tight on Baby Carrots, Cellos, and Jumbos, with limited availability. Rainbow Carrots remain steady with good quality and supply. Harvesting has been challenging because of muddy fields. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Rainfall has affected harvesting for all of the growers. Cellos and Jumbos are the most heavily impacted. Prorates should be expected. Availability will remain limited until conditions improve (Approx. 2-3 weeks). There are Jumbos available in GA if you could load there. ***Growers request orders be sent in as early as possible.***

**Cauliflower: EXTREME** Quality is okay, but supplies have tightened up. The market is now at the Extreme level.

**Celery: EXTREME** Quality is okay, and supplies are extremely tight. Weather has affected harvesting and quality, prorates should be expected on VA items until mid-February and Carton Celery is being held to strict averages. Quality issues should be expected as they growers work through the affected fields.

**Corn, Sweet: ESCALATED** We will continue to see a split market on corn this week due to cold weather in Florida. Markets were higher out of Florida over Mexico. Quality is good out of Mexico and will be impacted in Florida. We need to assess the impacts of the extreme cold weather that spread across the growing regions throughout the state this past weekend. We do expect to see major losses and supply issues over the coming weeks.

**Fennel: ESCALATED** Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

**Kale:** Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

**Leeks: ESCALATED** Quality and supplies look okay.

**Garlic:** Quality remains good, although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

**Ginger:** Supplies and market are steady.

**Green Cabbage:** Supplies and quality are good.

**Green Onions: EXTREME** Supplies are extremely limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging through mid-February. Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to very strict averages, when possible, but prorates should be expected for at least the next two weeks.

**Mushrooms:** We are now into our typical holiday pattern, with lower volume and extremely high demand. Supply is expected to be light through the first of the year. Quality is good.

**Napa Cabbage:** Quality is good, but supplies are tight. The market is increasing.

**Parsley (Italian & Curly):** Supplies and quality are 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: WATCHLIST** Quality looks good, but supplies are light.

**Spinach: EXTREME** Supplies remain limited. Reports of weak texture, discoloration, and wilting continue. We are also now seeing disease pressure and mildew which are further impacting yields.

**Spring Mix:** Supplies are limited this week. Weather has affected harvesting and quality, causing additional supply issues. We are also now seeing disease pressure and mildew which are further impacting yields.

**Snow Peas and Sugar Snaps: ESCALATED** Adverse weather has impacted both major growing regions, with heavy rainfall in Northern Mexico and freezing temperatures in Guatemala significantly reducing production. As a result, supplies are expected to remain limited over the next 14 to 21 days, until the Baja season begins to ramp up and provide additional volume.

#### **Onions:**

The onion market remains stable. With harvest concluded, all products will ship exclusively from storage in the Pacific Northwest. While modest increases may occur, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

#### **Potatoes:**

Potato supply for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

## **Tomatoes:**

### ***Tomato Suspension Agreement Update***

*As we continue to navigate the impacts of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties will be imposed on Mexican tomatoes. We are actively working with each grower partner to gather a breakdown of how duties will be applied for tomatoes imported from Mexico and will provide updates once we have completed the implementation process.*

## **East Coast**

- **Round and Roma Tomatoes: EXTREME** Markets are expected to be firm and short as growers attempt to assess the damage caused by the deep freeze that spread across Florida this week. As growers attempt to salvage what they can, we look to the future and expect tight markets, short supply with possible interruptions between now and Late March at the earliest. We will continue to assess these impacts with our growers and provide updates as soon as possible. We do expect the need to sub sizes and varieties to navigate this unprecedented weather event.
- **Snacking Tomatoes: Grape Medley, Grape Tomato, Cherry Tomato: EXTREME** Supply was very short this week, and pricing was higher. We are assessing the damages and impacts of the recent cold weather on future plantings. We will need to assess the impacts of the extreme cold weather that will hit South Florida this weekend and could impact markets next week

## **Mexico**

- **Round Tomatoes: ESCALATED** Volume is slowly improving, and demand from the east is higher offsetting the increase in volume. We will see stronger markets with very high FOB prices established. Quality remains very good through McAllen, and Nogales.
- **Roma Tomatoes: ESCALATED** Volume is slowly improving, and demand from the east is higher offsetting the increase in volume. We will see stronger markets with very high FOB prices established. Quality remains very good through McAllen, and Nogales.
- **Snacking Tomatoes:**
  - **Grape Tomatoes, Grape Medley and Cherry Tomatoes: ESCALATED** Lighter supply and higher demand from the east have pushed prices up a tad and expecting that trend to continue this week with the cold weather in Florida. Quality is outstanding.

## **Other Fruit:**

**Apples:** The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once

fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

**Pears: D'Anjou** availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. **Red D'Anjou** pears are moderately available in US #1 35–55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

**Pomegranate:** Steady supply available out of California.

**Asian Pears:** Lighter volume, good supply on larger sizes.

**Cherries:** Steady supply available out of Argentina and Chile.

**Stone Fruit:** Good supply on Peaches currently out of Chile.

**Kiwi Fruit:** Supplies fair out of California as well as offshore landing on the East Coast.

**Quince:** Limited supply available this week.