

The Source

Commodity of the Month - Tender Leaf Lettuce



MARKET ALERTS

Blackberries: Supplies are currently very limited, but availability is expected to improve once Mexico ramps up production in late September.

Blueberries: Pacific Northwest season is ending due to weather and school demand, with a production gap until Central Mexico, Baja, and Peru start in late September or early October.

Strawberries: Salinas and Watsonville are experiencing lower yields due to heat-related quality issues. Santa Maria has begun producing small volumes of new crop, which should increase next week and help alleviate current strong demand.

Broccoli: Supplies are tight across all regions, with quality expected to be fair to good. A slight market increase is anticipated heading into the weekend.

Cauliflower: Recent weather in Salinas has favored insect growth, causing damage to some cauliflower crops. Supplies are expected to remain tight through next week.

Oranges: Markets are strengthening with high school demand, but Valencia supplies are low. Available in Central Valley (56ct+) and Riverside (88ct). Offshore navels or other fruits like apples and grapes are alternatives. Domestic Navels start in mid to late October.

Green Onions: Will be very limited for the next couple of weeks due to supply issues in Mexico caused by high temperatures.

Iceberg Lettuce: Market is firming up with low inventories, average weights of 39-44 pounds, and varying prices.

AUGUST 28, 2024

CROP UPDATES

As Pacific Northwest potato harvests commence, storage supplies are rapidly depleting, with air cracks and pressure bruising becoming more common due to constant contact with adjacent potatoes' weight in storage, indicating the aging of these supplies. [Read more](#)

WEATHER

Arizona - High-pressure over the Southwest will keep temperatures above seasonal norms through the weekend, with highs in Imperial and Coachella Valleys and 105-110°F in southwest Arizona.

California - The weekend will see temperatures gradually cool, with morning lows in the mid-40s to low 60s, coastal daytime highs in the mid-60s to low 70s, peaking in the low 80s to 90, and highs in the upper 80s to low 90s.

Florida - Easterly winds and sea breeze showers and thunderstorms will persist through the weekend, with the highest chances of rain in interior and southern Florida. Winds may gust up to 20 mph.

Mexico - Isolated showers and thunderstorms will persist through the month, with rainfall ranging from 0.02" to 0.20". Seasonally warm temperatures through weekend.

FREIGHT

Freight from the Pacific Northwest is active as new crop Potato supply increases, while Florida is slowing down for the 24-25 season, with backhauls being difficult.



IN PEAK SEASON



MARKET ALERTS

Tender Leaf Lettuce: Spinach supplies will remain tight next week due to hot weather affecting seed germination and yields. The tight supply situation is expected to continue.

Mushrooms: Heat waves have affected current availability, but supplies are expected to improve in the next two weeks.

Pineapples: Supply is short with priority on contracts. Costa Rican pineapples face drought and delays; larger fruit is scarce. Mexican crossings are low. New crop arrives in early September.

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Commodity Updates



Apples

The Washington harvest is in full swing with new crop Galas and Honey Crisps, while Golden Supremes are set to begin this week and next. As storage inventories dwindle, the market is gradually rising. Fujis and Pinks remain in short supply until the new crop becomes available.

Commodity/Region	Supply	Price	Quality
Hudson, New York (September - June)	Steady	\$\$\$	Good



Asparagus

Mexico's asparagus supply continues to favor smaller sizes, while Peruvian volumes are improving but also skewing smaller. Harvesting has started in Southern Peru. The market remains strong for large, XL, and Jumbo sizes, with good quality reported from both Peru and Mexico.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Steady	\$\$\$	Good
Ciudad Obregon (Year Round)	Steady	\$\$\$	Good
Peru (Year Round)	Steady	\$\$\$	Good



Avocados

Markets are improving as the Flora Loca crop is harvested, though 48ct and larger sizes remain high due to the peak size being 60/70ct. Typically, Flora Loca floods the market, but this year's oil content needs to be at least 24% before harvesting, and recent rains in Mexico have slowed dry matter development. This will extend ripening times and limit #2 grade fruit through August and September. The Negra crop is nearly finished and available sporadically. California supplies are diminishing and will last through August, while Peruvian supplies are decreasing and expected to run through the month as well. Flexibility with alternate origins and sizes will be needed. Please submit orders with ample lead time for ripening and inventory planning, as availability may vary.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Good
California (April - July)	Light	\$\$\$	Good



Bell Peppers

The market is steady to slightly lower. Eastern supplies are moderate, mainly due to weather conditions. In California, green bell peppers have transitioned to the coastal areas of Gilroy, Hollister, and Oxnard, where volume is improving. Red bell peppers remain available from the valley, with harvesting beginning in the coastal areas this week. FOB prices are slightly lower.

Commodity/Region	Supply	Price	Quality
California (May - October)	Steady	\$\$\$	Good
Ohio/NC/MI/NJ (June - September)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



Commodity Updates



Berries (Blackberries)

ALERT

Blackberry supplies remain very limited, but we expect improved availability once Mexico increases production in late September.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Fair



Berries (Blueberries)

ALERT

The Pacific Northwest season is winding down quickly due to weather and rising demand from school business. We anticipate a production gap until Central Mexico, Baja, and Peru start their seasons in late September or early October.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Fair
Dover, Florida (Year Round)	Light	\$\$\$	Good



Berries (Raspberries)

The surge of product from Baja a few weeks ago has tapered off, and supplies will be lighter in the coming weeks. However, we expect production to pick up again in mid-September, primarily from Mexico.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Fair
Dover, Florida (Year Round)	Steady	\$\$\$	Good



Berries (Strawberries)

ALERT

Salinas and Watsonville are seeing declining numbers, with last weekend's heat causing a drop in yields due to quality issues. Santa Maria has started producing light volumes of new crop, which are expected to increase next week, helping to ease the strong demand we're currently experiencing.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Fair
Dover, Florida (Year Round)	Steady	\$\$\$	Fair

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Commodity Updates



Broccoli

ALERT

Broccoli supplies are tight across all growing regions. Quality is expected to range from fair to good through next week. The market is likely to see a slight increase as we head into the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	Steady	\$\$\$	Good
Salinas (May - October)	Steady	\$\$\$	Fair



Brussel Sprouts

Overall volume is gradually improving, with industry-wide supplies increasing and the open market softening. Additional capacity in both processed and bulk pack categories offers a great opportunity for promotions.

Commodity/Region	Supply	Price	Quality
Mexico (December-August)	Steady	\$\$\$	Good
Oxnard / Salinas, CA (May - July) (July-Dec)	Steady	\$\$\$	Good



Carrots

The Cuyama/Santa Maria area is the main growing region and will continue through November. Jumbos and cellos are tight with higher market prices, but regular business is being covered. There is plenty of availability for baby and snack packs, which is ideal as schools resume.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	Steady	\$\$\$	Excellent
Kern County (October - Feb)	Steady	\$\$\$	Excellent
Various Northwest Regions (July - October)	Light	\$\$\$	Good



Cauliflower

ALERT

Recent weather in the Salinas growing districts has created ideal conditions for insect population growth, leading to damage in some of the cauliflower crops. As a result, cauliflower supplies are expected to remain tight through next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair
Santa Maria, California (Year Round)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Celery

Supplies of this commodity will be good both north and south throughout the week, with the market remaining steady. All sizes are available, with large sizes being the most plentiful. The best offers are coming from Oxnard/Santa Maria, so take advantage of these opportunities for promotion. Quality remains above average with most suppliers.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



Commodity Updates



Citrus (Lemons)

Fruit is peaking at 115ct and larger sizes, while 165ct and smaller sizes will remain extremely tight through the summer until District 3 starts in mid to late September. Markets for 140ct and smaller sizes will stay strong. With District 1 (San Joaquin Valley) finished, District 2 (Oxnard/Ventura County) is now the main growing region, focusing on larger fruit. Offshore supplies on the West Coast are starting to provide some relief for domestic lemons.

Commodity/Region	Supply	Price	Quality
Oxnard/Ventura (October - February)	Light	\$\$\$	Good
San Joaquin Valley (October - May)	Light	\$\$\$	Good



Citrus (Limes)

The market has improved, but supplies are now limited. Demand is rising while crossings are down. Fruit is peaking on 110/150ct sizes. Quality remains inconsistent due to a mix of old and new fruit, with better-quality options commanding higher FOBs as shippers adjust for proper grading.

Commodity/Region	Supply	Price	Quality
Veracruz (Year Round)	Light	\$\$\$	Good



Citrus (Oranges)

ALERT

Markets are strengthening with increased school demand, but harvests remain low as we try to extend the short Valencia season. Valencias are currently available in the Central Valley (peaking on 56ct and larger) and Riverside (peaking on 88ct). Contracts are a priority, and some shippers are already allocating supplies due to reduced availability. Offshore navels are available on both coasts as an alternative, and if they're not an option, consider switching to other commodities like apples or grapes. The Domestic Navel crop is expected to start in mid to late October, with Valencia Brix around 12.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (Year Round)	Light	\$\$\$	Good



Cucumber

Supplies from Michigan remain steady and of good quality. While most summer deals are wrapping up, North Carolina crops are expected to begin next week. Out west, Baja and Central Mexico are providing light supplies with fair quality, and this trend is likely to continue for a few more weeks. Cucumbers are anticipated to start arriving from Nogales in October.

Commodity/Region	Supply	Price	Quality
Georgia (May - June)	Steady	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good
Baja California (May - October)	Steady	\$\$\$	Good



Eggplant

Eggplant supply in the East is adequate, with strong quality. Summer programs will continue for a few more weeks, with the Carolinas expected to start by mid-September. In California, supply remains light and quality is fair, but we anticipate some relief soon as more growers come online.

Commodity/Region	Supply	Price	Quality
California (May - October)	Light	\$\$\$	Fair
Georgia (May - June)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Garlic

The transition to the new crop harvest in California has begun. Quality is currently good, and supplies are expected to remain strong going forward.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Steady	\$\$\$	Good
Bakersfield, California (Year Round)	Steady	\$\$\$	Good
Gilroy, California (Year Round)	Steady	\$\$\$	Good



Grapes (Green)

There's been no change in the market for greens, which remains very soft. Most shippers have three or four varieties in inventory, leading to more flexible pricing. Quality varies between lots, and with grapes, you get what you pay for. This market trend is expected to continue for another week to 10 days.

Commodity/Region	Supply	Price	Quality
Mexico (May - June)	Steady	\$\$\$	Excellent



Grapes (Red)

The market for reds is mostly steady. Flames are nearly finished, but strong demand is expected to keep prices stable.

Commodity/Region	Supply	Price	Quality
Mexico (May - June)	High	\$\$\$	Good



Green Onions

ALERT

Green onions will be very limited for the next couple of weeks due to ongoing supply issues in Mexico caused by high temperatures in the growing regions.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair



Kale

Kale supplies are expected to be plentiful and of good quality this week and next, with the market likely remaining steady.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Salinas, CA (May - OCT)	High	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$ -Steady, \$ -High

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Commodity Updates



Lettuce Iceberg

ALERT

The market for this commodity has firmed up and is expected to become more active next week. School business has increased demand, and many shippers are reporting lower inventories compared to last week. Weights continue to average 39-44 pounds, with some shippers offering jumbo-sized heads. While there are reports of slight discoloration and misshapen heads, overall quality remains above average. Pricing in the industry still shows some variation.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (March-December)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Lettuce Leaf

Romaine, green leaf, and red leaf lettuces have started to strengthen in the market due to lighter supplies compared to previous weeks. Quality issues such as fringe and tip burn are affecting the fields, and increased demand from the school business has contributed to the tighter supply. Currently, all orders are being fulfilled in full. The market is expected to remain strong next week with multiple shippers.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Salinas, California (May - October)	Steady	\$\$\$	Fair



Lettuce Tender Leaf

ALERT

Spinach supplies will remain tight through next week due to hot weather early in the growing season, which affected seed germination and resulted in uneven stands and lower yields. Expect the tight supply situation to continue.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Oxnard, California (Year Round)	Steady	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Melon (Cantaloupe)

The cantaloupe market is strengthening, with excellent quality from central California. Market prices are fluctuating daily as shippers capitalize on increased demand. Load volume deals are available for retailers aiming to finish the summer crop strong. Bloom drop is starting to affect yields, particularly for smaller fruit. Bid season for Fall and Winter is also approaching.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Steady	\$\$\$	Excellent

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



Commodity Updates



Melon (Honeydew)

The Honeydew market is heating up as fields produce larger honeydews and smaller sizes become less available. Shippers are focusing on honeydew contracts, leading to a doubling of market rates in the past two weeks. A gap in smaller honeydews may occur due to bloom drop. The Arizona crop will be available by mid-September, while Mexican honeydews will start arriving at the end of September or early October.

Commodity/Region	Supply	Price	Quality
Arizona (June-July) (October-November)	Light	\$\$\$	Excellent



Melon (Watermelon)

Regional watermelon deals are available, with larger sizes (28/26 count) being the most prominent. Demand remains strong, especially for smaller sizes (45/60), as retailers continue to promote summer fruit. However, quality may become a concern as California begins to experience cooler weather.

Commodity/Region	Supply	Price	Quality
Arizona (June-July) (October-November)	Steady	\$\$\$	Good



Mushroom



Previous heat waves have impacted current availability, but supplies are expected to improve over the next two weeks.

Commodity/Region	Supply	Price	Quality
Nationwide	Light	\$\$\$	Good



Onions

The new crop harvest has begun in the Northwest. Day-to-day availability depends on current harvests, so longer order lead times are recommended. The market is elevated for all colors.

Commodity/Region	Supply	Price	Quality
Eastern Oregon/Parma, ID (August - April)	High	\$\$\$	Excellent
San Joaquin Valley (May - August)	Light	\$\$\$	Good
Tri-Cities, Washington (July - April)	High	\$\$\$	Good



Pears

California pears are beginning to thin out, with Red Pears and Bartletts becoming less available. Bosc pears will continue to be available in good volumes through September. Washington has started harvesting Bartletts this week, though volumes are light and expected to increase next week. Due to frost during the bloom period, Washington's crop is smaller than last year, especially in the Wenatchee district. Expect the market to remain steady with higher pricing.

Commodity/Region	Supply	Price	Quality
Hood River, Oregon (August-July)	Light	\$\$\$	Good
Yakima, Washington (August-July)	Light	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Pineapples

ALERT

Supply is falling short of demand, with contracted business remaining a priority. Costa Rican pineapples are facing challenges due to a lack of rainfall in the tropics and port delays on the West Coast affecting loading schedules. Larger fruit is particularly difficult to find. Mexican crossings are lower year-over-year, and new crop arrivals are expected at the beginning of September. Quality issues are also contributing to reduced crossings from Mexico.

Commodity/Region	Supply	Price	Quality
Costa Rica (Year round)	Light	\$\$\$	Good



Potatoes

Storage crop Brubanks are winding down and are now limited to #2s. New crop Norkotahs are increasing, with prices remaining higher for 40-70 CT sizes.

Commodity/Region	Supply	Price	Quality
Idaho Falls, Idaho (August-July)	Steady	\$\$\$	Good
Pasco, Washington (August-July)	Steady	\$\$\$	Excellent



Squash

Cooler temperatures have temporarily reduced squash production in the Eastern regions, but a warm spell is expected to improve yields soon. New Jersey is seeing high-quality squash from new plantings, while New York is producing moderate quantities with good quality. North Carolina has started harvesting squash, with volumes expected to increase. In the Western regions, California and Baja, Mexico are the main suppliers, and mainland Mexico is expected to resume shipping through Nogales in late September.

Commodity/Region	Supply	Price	Quality
Mexico (November - May)	Steady	\$\$\$	Good
California (May - Oct)	Steady	\$\$\$	Good
Ohio/MI/OH/NJ/NC (June - September)	Light	\$\$\$	Good



Stone Fruit

Peaches, plums, and nectarines are in lighter supply due to the hotter summer temperatures, with both the peach and nectarine seasons likely ending in September rather than October. Plums are also affected but should extend into November due to late-season varieties. Early pomegranates have started, and the kiwi market is active as shippers are slow to pack controlled atmosphere fruit. Expect kiwi prices to rise over the next few weeks.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (May-October)	High	\$\$\$	Excellent



Tomatoes

Demand is down, prices are lower, and supplies have improved. Eastern supply is strong, with good quality holding up despite recent weather. Tennessee will continue through October before transitioning to Florida for the winter. Out west, California supplies are steady and quality has improved with cooler weather. Baja and central Mexico are also seeing better volumes thanks to improved weather conditions.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Florida (November-May)	Steady	\$\$\$	Good
Baja California (Spring/Summer - NOV)	Steady	\$\$\$	Good
California (July - OCT)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



FRESH LINK



Weather Updates



CALIFORNIA

After another hot day, temperatures will steadily cool through the weekend. Morning lows will range from the mid 40s to low 60s. Coastal daytime highs will be in the mid 60s to low 70s today, dropping to the low 60s by Friday. In the coastal valleys, temperatures will peak in the low 80s to 90 today, then fall to the mid 70s to mid 80s by Saturday. South of Soledad, expect highs in the low 90s to 100 on Wednesday and upper 80s to low 90s on Sunday.



MEXICO

Isolated showers and thunderstorms will persist through the beginning of the month, with rainfall totals typically between 0.02” and 0.20”, though some thunderstorms may bring higher amounts. Temperatures are expected to remain seasonably warm through the weekend, with highs in the upper 70s to upper 80s and lows ranging from the mid 50s to mid 60s across the region.



FLORIDA

Easterly winds and sea breeze showers and thunderstorms will continue through the weekend, with the highest chances for rain in the interior and southern Florida. Rainfall will generally range from trace amounts to 0.20” in most showers, though some thunderstorms could produce higher totals. Winds will gust up to 20 mph over the next three days in southern Florida. Expect daytime highs in the upper 80s to mid 90s and nighttime lows in the mid 70s to low 80s through Sunday morning.



ARIZONA

Persistent high-pressure over the Southwest will keep temperatures above seasonal norms through the weekend. Highs are expected to range from 108-113°F in the Imperial and Coachella Valleys, and 105-110°F in southwest Arizona. Morning lows will be in the mid 70s to low 80s. Moderate to gusty southerly winds are anticipated, accompanied by low humidity levels.

For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

Freight Updates



Freight this week from the Pacific Northwest is very active as new crop Potato supply ramps up. Expect truck capacity to build as that region continues into the new season. Florida is starting in a slow way for the 24-25 season with some imports and local crops starting. For now, Florida is very slow and backhauls out of the state are very difficult.



U.S. On-Highway Diesel Fuel Prices*(dollars per gallon)

[full history](#) XLS

	08/12/24	08/19/24	08/26/24	Change from	
				week ago	year ago
U.S.	3.704	3.688	3.651	↓ -0.037	↓ -0.824
East Coast (PADD1)	3.778	3.757	3.725	↓ -0.032	↓ -0.750
New England (PADD1A)	4.058	4.019	3.969	↓ -0.050	↓ -0.464
Central Atlantic (PADD1B)	3.961	3.935	3.920	↓ -0.015	↓ -0.696
Lower Atlantic (PADD1C)	3.681	3.664	3.628	↓ -0.036	↓ -0.801
Midwest (PADD2)	3.681	3.674	3.627	↓ -0.047	↓ -0.758
Gulf Coast (PADD3)	3.371	3.355	3.317	↓ -0.038	↓ -0.852
Rocky Mountain (PADD4)	3.697	3.650	3.608	↓ -0.042	↓ -1.050
West Coast (PADD5)	4.309	4.294	4.272	↓ -0.022	↓ -1.030
West Coast less California	3.913	3.905	3.893	↓ -0.012	↓ -1.080
California	4.763	4.739	4.707	↓ -0.032	↓ -0.971

*prices include all taxes

For more information: <https://www.eia.gov/petroleum/gasdiesel/>

Crop Update

Potato White Blush

As new crop potato harvests begin in the Pacific Northwest, storage supplies will quickly wind down over the next few days. Some of these supplies are showing their age with air cracks and pressure bruising more prevalent on these final pack outs. These are fairly common problems in the waning storage supplies due to constant contact with the weight of adjacent potatoes in storage.

Washington harvests continue this week with generally good quality, however, the size profile is on the small side in these early harvests as Idaho joins the mix this week. These new crop Norkotah harvests will yield mostly #1 grade potatoes with very little #2 or process grade in these early harvests.

Until these new crop potatoes have a chance to cure in storage, these supplies tend to show occasional feathering or skinning (abrasions from harvesting and handling) and excess moisture may be evident. These conditions can lead to the formation of white blush on freshly harvested potatoes. Steps can be taken to prevent or reduce the formation of white blush.

- **Proper Handling:** Handle potatoes with care to minimize damage to their skin as damaged areas are more prone to moisture loss and white blush.
- **Ventilation:** Ensure proper ventilation in the storage area to prevent excess moisture buildup which can contribute to white blush.
- **Storage conditions:** Store potatoes in a cool, dark and humid environment. Humidity will help the potatoes maintain their natural moisture content and reduce the likelihood of white blush formation.
- **Regular Monitoring:** Check your potatoes regularly and use those with a white blush sooner rather than later to prevent excessive starch buildup.



It is important to remember that white blush is a cosmetic issue and does not affect the taste, texture or overall quality of the potato.

TIM LYNCH

QUALITY ASSURANCE MANAGER