

The Source

Commodity of the Month - Grapes

MARKET ALERTS

Lemons - Peak fruit sizes are 115ct and larger, with 165ct and smaller sizes remaining tight. District 1 and District 2 are in play, with Oxnard/Ventura County being the main region. A strong market for 140ct through 200ct continues to rise.

Iceberg Lettuce - The markets are strong this week. A shortage of supplies in the Salinas Valley and Southern CA is due to cool weather, slowing growth. Pricing on value-added items will escalate, with reports of light weights, misshapen heads, discoloration, and spongy heads.

Lettuce Leaf - The romaine and red leaf markets are firm. Cool weather is slowing plant growth, leading to light supplies of romaine hearts. Expect defects in leaf items, such as small sizes, lightweights, twisting, and brown butts. Value-added romaine items are escalated.

Cantaloupe - Strong cantaloupe demand due to lower offshore yields. Mexican cantaloupes are available at a premium. Sizing flexibility may be needed. Specialty varieties available in Brawley, CA.

Onions - In CA and NM, supplies are improving. Stocks of red onions remain limited and prices remain high.

Squash - Mexico's absence has led to tighter supplies and prices increasing. Georgia's rain reduced quality products. California squash remains adequate due to lack of warm temperatures.

MAY 22, 2024

CROP UPDATES

Idaho potato growers face delays due to a cold, wet spring in the Northeast, with the Southwest planting for an early August harvest. Harvest peaks in September and ends in October. Storage crops will continue shipping until August, with smaller potatoes peaking and larger Burbanks becoming pricier. [Read more](#)

WEATHER

Arizona - Temperatures will remain near normal through Friday, with slight cooling on Saturday. Winds will be the most significant issue, with highs in mid-upper 90s, cooling to mid 80s-low 90s, and lows in the low-mid 60s.

California - Moderate marine layer conditions with slightly below-average temperatures are expected today due to weak high pressure. Winds will remain breezy with gusts up to 35 mph. A slow low will deepen the marine layer, prolong gusts, and cause spotty drizzle.

Florida - The state is expected to be warm and humid, with light showers and isolated showers. Winds will peak at 15 to 22 mph in Tampa Bay and southeast Florida.

Mexico - Over the next five days, warm temperatures and isolated showers are expected, with rain totals ranging from 0.02" to 0.20", with highs in the 90s to near 100 degrees.

FREIGHT

Truck market remains active with the memorial day weekend happening. We will continue to see above average demand for trucks though the 4th of July.

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LOGISTICS

IN PEAK SEASON



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Commodity Updates



Apples

There will be a good supply of Reds, Granny Smiths, and Fuji apples throughout the summer. Throughout June, Pink Lady and Honey Crisp prices will gradually rise.

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

Mexico continues to produce smaller sizes with lower production. Production in Peru continues to increase. Washington and Michigan are in full swing with good supplies. The markets are all very heavy to standard size. Markets are expected to remain steady into the weekend.

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

Markets are steady. With fruit arriving in volume in late-May/early-June, Peru is right around the corner. Fruit sizes are expected to peak at 60/70ct, which is unusual for Peruvian fruit entering the US. Mexican fruit ripens quickly because of higher dry matter. As California fruit is coming online in a light way, it will take longer to ripen due to the lower dry matter content.

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

Overall supply is steady. As Florida and Nogales wind down, Georgia and Coachella are the main regions. The quality is better in the newer areas. Volume is expected to increase as reds emerge from the CA desert. Production in Canada is steady.

Commodity/Region	Supply	Price	Quality
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Florida (November - May)	Light	\$\$\$	Good
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Mexico (November - May)	Light	\$\$\$	Good
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California (May - October)	Steady	\$\$\$	Excellent
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Georgia (May - June)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



Commodity Updates



Berries (Blackberries)

The production in this area is starting to pick up. The cooler weather has kept supplies steady. We are still a week or two away from warmer weather. The yields will be moderate as we enter the full summer weather patterns. Shippers expect an increase in transferred fruit coming from Mexico, which will keep markets low. High volume is currently crossing into the US from Central Mexico and Baja.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
McAllen, Texas (October-May)	High	\$\$\$	Good
Georgia (April - July)	Light	\$\$\$	Good



Berries (Blueberries)

Central California's production is slowly ramping up. Mexico is importing more fruit than ever before. Through the end of July, good volume is expected. Florida's production is finished, and Georgia's is just past peak. Much of the Georgia product is also being transferred to Florida to forward distribution centers. The product is being transferred to the West Coast for distribution of mixed berries. Volume orders are being booked directly from McAllen as volume increases.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
Dover, Florida (Year Round)	Steady	\$\$\$	Good
McAllen, Texas (October-May)	Steady	\$\$\$	Good



Berries (Raspberries)

West Coast production is slowly increasing. Markets are tapering off after previously being high.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
Dover, Florida (Year Round)	Steady	\$\$\$	Good
McAllen, Texas (October - May)	Steady	\$\$\$	Good



Berries (Strawberries)

The West Coast is experiencing cooler weather, which has helped keep the increase in volume manageable. Good volume is coming from Salinas, Watsonville, and Santa Maria. Over the next few weeks, the weather is expected to cooperate, keeping volume steady.

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

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

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Only the Finest Berries™



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Commodity Updates



Broccoli

In Salinas and Santa Maria, broccoli supplies are fair and quality is good. As we head into the weekend, this market is expected to remain steady.

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



Brussel Sprouts

This week, Brussels sprout supplies and quality remain excellent. Going into next week, this market is expected to remain steady.

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



Carrots

There is a steady market for whole carrots. Now, Imperial Valley is the main growing region. Next up is the Bakersfield area. The sizing looks good.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	Steady	\$\$\$	Excellent



Cauliflower

There is a good supply of cauliflower this week, as well as a good quality. The market is likely to trend downward heading into the weekend.

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



Celery

Large sizing continues to have light availability, industry wide. As a result of the cool weather in the growing regions, sizing has decreased and this trend will continue throughout the week. Shippers are flexing on 36-count packs. In California, production comes from Oxnard/Santa Maria. Salinas will begin harvesting in late June. Expect the value-added items to come off later in the week.

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

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

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Citrus (Lemons)

ALERT

Peak fruit sizes are 115ct and larger. The 165ct and smaller sizes will remain extremely tight throughout the summer. District 1 (San Joaquin Valley) and District 2 (Oxnard/Ventura County) are both in play and peaking at large fruit. With the San Joaquin Valley winding down, Oxnard/Ventura County is the main region. There is a strong market for 140ct through 200ct and it continues to rise.

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



Citrus (Limes)

With improved supply, markets have eased. Old fruit is moving at lower prices. The fruit is peaking in the 230/250s, but larger sizes are still a bit tight.

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



Citrus (Oranges)

Navels are nearing an end; Valencia's will be the main variety in the next few weeks. Valencia's crop will mirror Navel's. Fruit will peak at 72ct and larger; 88/113/138ct are incredibly scarce and will remain so throughout the Valencia season. As of now, Riverside is the main growing region for Valencias, with the Central Valley expected to begin in mid-/end-May. Quality is good; Brix are in the 13-14 range on Navels. Valencia's are in the 12 range. Florida is nearly finished as they struggle with regreening towards the end of the season.

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



Cucumber

The markets are about steady. There is still some product in Nogales and FL, but the supply and quality are declining. Baja will have their season numbers by early June, and Georgia is picking up on volume.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Light	\$\$\$	Fair
Mexico (November - May)	Light	\$\$\$	Fair
Baja California (May - October)	Steady	\$\$\$	Good



Eggplant

Steady out of the desert and FL. In a few weeks, Georgia will get started.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Steady	\$\$\$	Good
Mexico (November - May)	Light	\$\$\$	Good

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

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Commodity Updates



Garlic

Garlic supplies domestically remain tight. The transition to Mexican peeled garlic is quickly approaching this coming week. During the next few months, the garlic market is expected to become more volatile and tight.

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



Grapes (Green)

East Chilean greens are much tighter than west Chilean greens. There are good supplies of Mexican green seedless in Nogales. As Chilean inventories start to clean up, the market should firm up. Next week, domestic green seedless will begin in Coachella.

Commodity/Region	Supply	Price	Quality
Chile (January - April)	Steady	\$\$\$	Good



Grapes (Red)

A new crop of Mexican red seedless is now crossing in Nogales. As South American importers try to get out of the way, Chilean red wine prices are sharply lowering.

Commodity/Region	Supply	Price	Quality
Chile (January - April)	Steady	\$\$\$	Good



Green Onions

This week, green onion supplies are very good with better quality. Next week, supplies should be good.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	High	\$\$\$	Good



Kale

This week, kale supplies are expected to be plentiful and of good quality. Now is an opportunity to promote kale.

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 markets have started this week strong and are expected to continue through the week. There is a shortage of supplies in the Salinas valley due to the cool weather. In other words, the product is slowly growing. The southern CA region is experiencing similar problems. The escalation of pricing on value-added items will continue throughout the week. There have been reports of light weights, misshapen heads, discoloration, and spongy heads.

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



Lettuce Leaf

ALERT

The market for romaine and red leaf is firm. Due to a lack of market demand, green leaf is softer. Light supplies will continue on all packs of romaine hearts. As a result of the cool weather in the growing regions, plants are not able to grow in their normal cycle. Markets are expected to ease up next week. Value-added Romaine items are escalated. All leaf items are likely to arrive with small sizes, lightweights twisting, and brown butts throughout the week. These are defects seen industry wide.

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



Lettuce Tender Leaf

The availability of tender leaf items like cilantro and Italian parsley remains limited. Due to all the rains and excessive moisture, Quality is battling bacterial spotting. These markets will remain tight for the next couple of weeks.

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



Melon (Cantaloupe)

ALERT

Due to lower yields on offshore products, demand for cantaloupes has been strong. Retailers are putting melons on AD to capture the holiday pull. Mexican cantaloupes are available at a premium. To cover all orders, sizing flexibility may be required at time of loading. Brawley CA offers specialty varieties now.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Light	\$\$\$	Good

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

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Commodity Updates



Melon (Honeydew)

Due to additional crossings from Mexico, the honeydew market has remained stable. Honeydews from Mexico are peaking in smaller sizes (6/8), with large sizes becoming available in limited quantities. Domestic honeydew product will be available by the week of 5/20 after the offshore honeydew season ends this week.

Commodity/Region	Supply	Price	Quality
Arizona (June-July) (October-November)	Light	\$\$\$	Good
Central America (December - May)	Light	\$\$\$	Good



Melon (Watermelon)

Offshore Watermelon season is slowly coming to an end. This week, Mexican watermelons are available from Nogales and Texas. The warmer weather in Northern Mexico has improved the quality and yield of the product. There are still a limited number of Florida watermelons available to start the season due to the weather.

Commodity/Region	Supply	Price	Quality
Arizona (June-July) (October-November)	Light	\$\$\$	Fair
Central America (December-May)	Light	\$\$\$	Fair



Mushroom

Supply and availability are excellent.

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



Onions

ALERT

In CA and NM, supplies are improving. Stocks of red onions remain limited and prices remain high.

Commodity/Region	Supply	Price	Quality
South Texas (July-April)	Steady	\$\$\$	Good
Tri-Cities, Washington (July-April)	Light	\$\$\$	Fair
California Desert (April - May)	High	\$\$\$	Excellent



Pears

D'anjou is finishing up with some shippers. There are still small amounts of Bosc and Red Anjou left, but those will be gone by the end of the month. In late June or possibly early July, the green Anjou market will remain at higher pricing until the supply is exhausted. Starting the second week of July, new crop California Bartletts will be available south of Sacramento. California's early crop appears to be about 80% of last year's.

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

Spot market opportunities are limited, so suppliers are focusing on their contracts. Tropical weather has caused fruit to mature faster than normal, resulting in lower yields. Larger fruit is impacted.

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



Potatoes

Potato stocks are peaking at 80 CT and smaller. 40 CTs and Burbanks are commanding a premium. There are deals available on smaller sizes.

Commodity/Region	Supply	Price	Quality
Bancroft, Wisconsin (August-July)	Steady	\$\$\$	Excellent
Idaho Falls, Idaho (August-July)	High	\$\$\$	Excellent
Monte Vista, Colorado (August-July)	Steady	\$\$\$	Excellent
Pasco, Washington (August-July)	High	\$\$\$	Excellent



Squash

ALERT

With Mexico out of the picture supplies have tightened up drastically over the weekend and prices shot up significantly. In addition, Georgia received some rain last week, which reduced the availability of quality products. Due to a lack of warm temperatures, California squash is adequate. It's going to be a light week for Santa Maria this week.

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



Stone Fruit

Peaches, nectarines, apricots, and cherries are all rolling along. Plums will start the last week of May. Volumes and varieties will improve in June. As a result of increased supplies, Chile's Kiwi market is declining. The quality and supply are good. In June, Kiwis should reach their level.

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



Tomatoes

Weather conditions in FL have brought on fruit quickly; FL had a big flush last week, with a peak supply and lower prices. Towards the end of the month, however, volume will begin to decline as we transition north to Quincy. As Nogales approaches completion, supplies are increasing out of Baja.

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

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

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Weather Updates



CALIFORNIA

Weak high pressure continues to bring moderate marine layer conditions today with temperatures near to slightly below average. The wind will remain breezy with gusts up to 35 mph. The morning lows will be in the low 40s to low 50s, and the daytime highs will be in the upper 50s to upper 60s near the coast, and in the low 70s to mid 80s further inland. Through Saturday, a slow, dry low will deepen the marine layer, prolong the gusty winds, cause spotty drizzle, and cool maximum temperatures well below average. A weak high pressure system returns Sunday, bringing warmer temperatures.



MEXICO

We can expect warm temperatures and isolated showers over the next five days. Most showers will produce rain totals between 0.02" and 0.20", but higher totals could result in T-storms. Throughout the weekend, maximum temperatures will mostly be in the low 90s to near 100 degrees. By May 26th, low temperatures will reach the low-upper 60s over most fields.



FLORIDA

Over the weekend, the state will be warm and humid. Through the weekend, shower activity will be light and isolated. Over Tampa Bay and southeast Florida, winds will peak at 15 to 22 mph through Friday.



ARIZONA

Temperatures will remain near normal through Friday, with a slight cooling expected on Saturday. Winds will be the most significant issue during the period. Most areas today will have highs in the mid-upper 90s, cooling to mid 80s-low 90s by Saturday, while morning lows will be in the low-mid 60s for most valleys, around 50 in Wenden. The westerly winds gusted to 15-20mph all day Wednesday, 17-22mph Thursday, and 25-35mph by Friday afternoon.

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

Freight Updates



Truck market remains active with the memorial day weekend happening. We will continue to see above average demand for trucks though the 4th of July.



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

[full history](#) [XLS](#)

	05/06/24	05/13/24	05/20/24	Change from	
				week ago	year ago
U.S.	3.894	3.848	3.789	↓ -0.059	↓ -0.094
East Coast (PADD1)	3.966	3.916	3.895	↓ -0.021	↓ -0.017
New England (PADD1A)	4.277	4.233	4.174	↓ -0.059	↑ 0.008
Central Atlantic (PADD1B)	4.208	4.155	4.114	↓ -0.041	↓ -0.084
Lower Atlantic (PADD1C)	3.846	3.794	3.785	↓ -0.009	↑ 0.005
Midwest (PADD2)	3.814	3.768	3.685	↓ -0.083	↓ -0.125
Gulf Coast (PADD3)	3.617	3.559	3.490	↓ -0.069	↓ -0.089
Rocky Mountain (PADD4)	3.785	3.791	3.746	↓ -0.045	↓ -0.342
West Coast (PADD5)	4.580	4.551	4.495	↓ -0.056	↓ -0.091
West Coast less California	4.079	4.053	4.012	↓ -0.041	↓ -0.366
California	5.155	5.123	5.049	↓ -0.074	↑ 0.224

**prices include all taxes*

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

Crop Update



Our Idaho potato growers have their seeds in the ground and have started the waiting game until harvest. Idaho potato growers use Mother's Day as a benchmark to gauge planting next year's potato crop. This year has brought the Northwest a cold and wet spring, which has caused delays in planting, especially for growers on the Rexburg Bench, located in the Northeast of the state. The early and warmer growing areas in Idaho's Southwestern part of the state have had seeds in the ground since April in anticipation of an early August harvest. Southern Idaho represents the earliest crop available to harvest but does not plant as heavily as the cooler areas in the Northeast.



Our next benchmark in next year's crop progression is the 4th of July. Growers look for the potato vines to be touching and flowers to form on the plants. Flowers indicate that energy is sent from the plant into its roots to form tubers. Harvest peaks in September and will conclude in October as growers rush against cold weather to put enough potatoes into cellars to last us again until the following year.



This summer will be favorable for us. We expect to see our growers continue to ship storage crops until the new crop begins to be harvested in early August. Storages are dominated by 90 CT and smaller potatoes and will continue to peak on smaller potatoes as we progress into the summer. Norkotahs are expected to remain on the market later than usual as improvements to storage and varieties have made for a more stable potato. The Burbanks expected to carry us into new crop Norkotahs have excellent quality but lack size. 40 through 60 CT will continue to increase in price and decrease availability as we progress through the summer.



JOEY PIEDIMONTE
SOURCING MANAGER