

The Source

Commodity of the Month - Avocado

MARKET ALERTS

Bell Peppers: Supplies are limited from Georgia due to low yields, while South Florida will start with light volumes in two weeks; out west, adequate supply features smaller sizes, with light Coachella harvest volumes and Sonora shipping through Nogales by November 24.

Broccoli: Market remains elevated due to recent heat and insect pressure limiting available acres, and is expected to stay high into next week.

Oranges: This is the final week for shipping Valencias, with domestic Navels set to begin shipping the week of 10/21 at smaller peak sizes beneficial for the foodservice sector, and current gassing times are approximately 96 hours.

Mushrooms: Demand is exceeding available supplies as production slows with the arrival of fall, and we expect supplies to tighten further as the holiday season approaches.

Pineapples: Suppliers are focusing on contracted business while maintaining six-week averages, with Costa Rican pineapple suppliers improving despite weather-related inventory issues; heavier rainfall is expected to enhance quality and supply, although larger fruit remains scarce, whereas Mexican pineapples are more readily available in the U.S. with better quality reported.

Tomatoes: Prices are elevated due to delays from Hurricane Helene in Quincy and damage from Hurricane Milton in Ruskin-Palmetto, leading to significant crop losses and expected shortages for the next 45 to 60 days until Sinaloa ramps up production, while increased demand from the East pressures the Baja market.

OCTOBER 16, 2024

CROP UPDATES

Hurricanes Helene and Milton have severely damaged crops in the Southeast, particularly in Tennessee, Georgia, the Carolinas, and Central Florida, impacting fall supplies of various crops. Coupled with extreme heat in California and low production from Central Mexico, this situation is expected to create significant supply challenges this fall. [Read more](#)

WEATHER

Arizona - A low-pressure system will move into the low deserts, bringing scattered light showers and cooler temperatures. Rainfall will mainly affect the I-10 corridor, with winds strengthening to 20-30 mph. Highs will drop.

California - A low-pressure system is causing low temperatures and marine layer drizzle. Morning lows range from 40s to 50s, with highs reaching 60s near the coast. Winds increase as the system exits Thursday, and high pressure strengthens over the weekend.

Florida - Northern and Central Florida are expected to experience dry weather, while South-Central and Southern Florida may experience isolated showers and thunderstorms. Winds are expected to gust between 25-30 mph.

Mexico - Warm temperatures and isolated showers are expected over the weekend, with rainfall typically less than 0.10 inches. Maximum temperatures range from 70s to 80s.

FREIGHT

As winter approaches, lettuce harvests in Huron, CA, are causing trucks to make extra stops to fill trailers, resulting in longer wait times at suppliers. Crop volume in the Salinas Valley is expected to decrease, and we will monitor winter growing regions.

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LOGISTICS

IN PEAK SEASON



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Commodity Updates



Apples

All major apple varieties are now in new crop harvest, with the exception of Pink Lady's, which will begin at the end of the month. Volumes are down across nearly all varieties compared to last year's crop, particularly for Granny Smiths. Additionally, size profiles are posing a challenge for the food service industry, as many varieties are skewing toward larger sizes. This creates pressure on smaller sizes, with food service competing with retail for bagged packs. The exception is small Galas, where there's still ample supply of 125/138s for now.

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



Asparagus

Production in both Southern and Northern Baja, Mexico is on the rise and is expected to increase steadily over the next three to four weeks. However, quality remains only fair due to regional heat. In Peru, volumes are also ramping up and should continue to grow over the next five to six weeks. Southern Peru is opening additional fields, which should support larger sizing. With improved production from both regions, markets are beginning to adjust downward.

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



Avocados

Markets remain steady as the Adventajada crop begins in a light way, shipping alongside the Flora Loca crop. Dry matter levels are holding around 26% for both, so checkerboarding issues should be minimal, if any. The Loca crop is about 50% harvested, with plenty of fruit still on the trees. Mexico is size-selecting based on demand for export.

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



Bell Peppers



Supplies are limited, with low yields and reduced quality coming out of Georgia. South Florida is set to start in two weeks, though initial volumes are expected to be light. Out west, supply is adequate, but current crops are producing smaller sizes. The new Coachella harvest has just begun with light volumes this week, and Sonora is expected to be the next major region, shipping through Nogales by the week of November 24.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

This item is expected to become more readily available as increased volumes from Central Mexico are shipped FOB from McAllen, Texas, with product transfers also heading to the West Coast.

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



Berries (Blueberries)

Peruvian offshore fruit is expected to arrive in more consistent volumes starting next week, helping to end a two-month shortage. Over the coming weeks, we anticipate steady imports from Peru. Central Mexico is also set to see a gradual increase in supply, beginning in the first week of November.

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



Berries (Raspberries)

Spotty supplies from Central Mexico are expected over the next 2 to 3 weeks. However, product is arriving at the border with increasing regularity, and volumes will gradually rise in the coming weeks.

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



Berries (Strawberries)

Volumes from Salinas and Watsonville are steadily declining, while production is peaking in Santa Maria and Oxnard. Demand remains moderate, with a softer tone for volume orders.

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

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

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Commodity Updates



Broccoli

ALERT

The broccoli market remains slightly elevated due to the recent heat, which has taken a toll on crops. Insect pressure, along with issues like brown bead and premature breakdown, are limiting available acres. Expect the market to stay elevated into next week.

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



Brussel Sprouts

Brussels sprout supplies remain steady, with strong volumes expected over the next few weeks. Demand has increased slightly, and there's plenty of raw product to meet current needs. Open market pricing remains aggressive, with deals available. Overall quality is very good, though mildew could become an issue in the coming weeks.

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



Carrots

The Cuyama/Santa Maria area is the primary growing region, expected to continue production until nearly November. While jumbos and cellos are experiencing tighter supplies and increased prices, standard orders are still being fulfilled. There is ample availability of baby and snack packs, which aligns well with the return of schools.

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

Cauliflower supplies are good and consistent from Salinas and Santa Maria, with markets expected to remain steady into next week. Supplies from Mexico are not as abundant, but California's production will help supplement the lower volumes coming from that region.

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



Celery

Supplies are robust across all sizes, with twenty-four counts available throughout the week. Demand is moderate at best. The most competitive deals are coming from the Oxnard/Santa Maria region, where shippers are flexible. Overall quality remains strong, with minimal seed issues reported.

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

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

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Commodity Updates



Citrus (Grapefruit)

Due to the extreme heat, the domestic grapefruit season has concluded. We anticipate about a one-month gap until Desert Rios become available in a couple of weeks.

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



Citrus (Lemons)

Markets are steady across the board. In District 2 (Oxnard/Ventura County), supplies are dwindling, with quality ranging from fair to good, despite year-round shipping. Meanwhile, District 3 (California Desert/AZ) is ramping up, and we can expect improved quality as we move into the new crop fruit.

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



Citrus (Limes)

Steady progress is being made, with quality and sizing gradually improving. The crop is still peaking on 230/250 count.

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



Citrus (Oranges)



We are in the final week of shipping Valencias, with domestic Navels expected to start shipping the week of 10/21. The peak sizes will initially be on the smaller side, which will benefit the foodservice sector. Currently, gassing times for the Navels are around 96 hours.

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



Cucumber

With multiple production areas in Baja, Central Mexico, Georgia, and a bit from North Carolina, overall supplies are sufficient to meet demand. Florida will begin its first light harvest next week out of Immokalee. Quality is average from Georgia, while it is better from Baja and Nogales.

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

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

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Commodity Updates



Eggplant

Supplies are adequate across the board, with availability from North Carolina, New Jersey, Georgia, and now South Florida. Fresno's supply and quality are sufficient, and Coachella is expected to begin production in late October.

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



Garlic

California garlic production is in full swing, with good quality and strong supplies expected to continue moving 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 / Red)

Domestic grapes are in good supply, with excellent eating quality. While black seedless grapes are slightly tighter, orders are still being fulfilled. Barring any unforeseen weather events, we expect to have California grapes available through mid-November. Imports are anticipated to begin in mid to late November, so there should be no gap between domestic and imported grapes.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

As temperatures begin to cool in Northern Mexico, we anticipate improved supplies over the next three weeks. The market is easing off its highs as we head into the weekend.

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



Kale

Kale supplies are expected to remain steady this week, and we anticipate the market will also hold steady as we head into the weekend.

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

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

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Commodity Updates



Lettuce Iceberg

Demand has increased slightly, and production has begun in Huron. Salinas and Santa Maria continue to offer good supplies, which are expected to last throughout the week. Overall quality remains above average, with weights ranging from 39 to 42 pounds across multiple shippers. Early reports suggest that the market may tighten in the coming weeks, making this an ideal time to promote. While there have been minimal reports of slight discoloration, misshapen heads, and pinking upon arrival, these issues are not widespread.

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

This market remains soft, with multiple suppliers having ample availability of romaine, as well as green and red leaf lettuce for the week. Suppliers are flexible, so promoting these items as much as possible is encouraged. The market is expected to tighten in the next week or two. There have been minimal reports of tip and fringe burn. Additionally, we anticipate good supplies of romaine hearts throughout the week.

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



Lettuce Tender Leaf

Supplies of cilantro, arugula, and parsley are expected to be slightly lower due to the recent heat, which is causing issues such as leaf miner damage and a weaker, thinner texture. As a result, we anticipate these markets will be elevated as we head into the weekend.

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 Westside cantaloupe growing season is beginning to wind down, with additional supplies now available from Brawley and Yuma. Quality has been excellent, with brix levels ranging from 12% to 14% as the Westside deal comes to a close. While larger sizes are readily available, growers have limited smaller melons. Offshore melons are expected to be available the week of 11/10/2024.

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

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

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Commodity Updates



Melon (Honeydew)

The honeydew market remains steady as supplies increase. Better sizing is now available, although honeydew 8s continue to be limited. Mexican honeydews are expected to arrive in Nogales, AZ.

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



Melon (Watermelon)

Watermelon supplies are improving on the West Coast, particularly in Nogales. East Coast and Georgia suppliers are heavily impacted by Hurricane Milton, which has shifted demand to the West Coast. Supplies are expected to be available through October, with new shipments arriving in mid-November via Nogales.

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



Mushroom



Demand is outpacing available supplies as production slows with the onset of the fall months. We anticipate that supplies will continue to tighten as we approach the holiday season.

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



Onions

The onion market has stabilized, with harvests completed in most regions. Quality is strong across yellow, red, and white onions, and supplies are meeting regular demand. However, prices are anticipated to rise in the coming weeks.

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

Washington has begun harvesting all major pear varieties. The market remains firm with higher prices, and this year is expected to be tight for pears, as Washington's crop has significantly decreased compared to last year's volumes. California pears are nearing the end of their season and are expected to wrap up for the year this month.

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

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

Key Partners



Commodity Updates



Pineapples

ALERT

Suppliers are maintaining six-week averages, prioritizing contracted business. Costa Rican pineapple suppliers are improving, but weather-related inventory issues persist. Heavier rainfall this month is expected to enhance quality and supply, though larger fruit remains hard to source. In contrast, Mexican pineapples are more readily available in the U.S., with reported improvements in quality from growing regions.

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

The market remains steady, with promotional pricing primarily offered on larger carton sizes as most growers complete their harvest. While the majority finished last week, a few are wrapping up during the first half of this week. Sizing trends this week are leaning toward larger profiles, and overall quality has been excellent.

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



Squash

Zucchini supplies are robust in the East, while yellow zucchini is tighter. Availability exists in Georgia, New Jersey, North Carolina, and light harvests are underway in Florida. Volume from Nogales is increasing as more growers come online."

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



Stone Fruit

Yellow nectarines, white nectarines, and white peaches have finished for the season, with peaches expected to wrap up later this week or next. Plums are in good supply and will be available through November. Asian pears have started and are in good volume, with domestic supplies expected to last into January. Additionally, domestic kiwi has begun, and the market remains steady at higher prices.

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

ALERT

Tomato prices are elevated across all regions. Quincy is starting late, having fallen behind schedule due to Hurricane Helene, while Hurricane Milton has also caused damage in the Ruskin-Palmetto region. Our teams are still awaiting full assessments, but early reports indicate significant crop losses, leading to expected shortages for the next 45 to 60 days, potentially until Sinaloa fully ramps up production in early January. Meanwhile, Baja is in between its fall crops, with increased demand from the East putting additional pressure on the markets.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Light	\$\$\$	Fair
Baja California (Spring/Summer - NOV)	Light	\$\$\$	Fair
California (July - OCT)	Light	\$\$\$	Good

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

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Weather Updates



CALIFORNIA

A low-pressure system moving to the north is dropping temperatures today and bringing spotty marine layer drizzle. Morning lows will range from the mid 40s to mid 50s, with daytime highs reaching the mid to upper 60s near the coast, low to upper 70s in the coastal valleys, and upper 70s to mid 80s south of Soledad. As the system exits on Thursday, winds will significantly increase, with gusts reaching up to 35 mph. Overnight lows will drop to the mid 30s to low 40s inland and the mid 40s to low 50s closer to the coast. High pressure will strengthen over the weekend, bringing temperatures back to near-normal levels.



MEXICO

Warm temperatures and isolated shower activity are expected through the weekend, with rainfall totals generally less than 0.10 inches in most areas. Maximum temperatures will mostly range from the low 70s to low 80s, with a few locations possibly reaching the mid 80s. Morning temperatures will cool into the low to upper 50s throughout the weekend.



FLORIDA

Dry weather is expected in Northern and Central Florida through the weekend. In contrast, isolated showers and thunderstorms are possible in South-Central and Southern Florida. While cool temperatures are forecasted for today, conditions will warm as we progress through the weekend. Winds are anticipated to gust between 25 and 30 mph across most of Southern Florida until October 18th.



ARIZONA

A cut-off low-pressure system will move into the low deserts from the northwest Thursday and Friday, bringing scattered light showers to central Arizona and cooler temperatures. Rainfall will mainly affect the I-10 corridor northward early Friday, with Borrego Springs seeing minor amounts. Winds will strengthen to 20-30 mph by Friday afternoon before subsiding over the weekend. Highs will drop from the low to mid-90s today to the 70s and low 80s by Friday, with morning lows falling to the 50s by Saturday.

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

Freight Updates



Fall crops such as Lettuce harvested in Huron, CA have trucks making extra stops to fill the trailer. We anticipate crop volume to diminish in the Salinas valley as winter approaches. This factor in turn, will require added wait time at the supplier level. Keeping an eye on winter growing regions as they develop.



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

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

	09/30/24	10/07/24	10/14/24	Change from	
				week ago	year ago
U.S.	3.544	3.584	3.631	▲ 0.047	▼ -0.813
East Coast (PADD1)	3.571	3.563	3.586	▲ 0.023	▼ -0.818
New England (PADD1A)	3.788	3.765	3.766	▲ 0.001	▼ -0.791
Central Atlantic (PADD1B)	3.802	3.821	3.861	▲ 0.040	▼ -0.811
Lower Atlantic (PADD1C)	3.463	3.447	3.464	▲ 0.017	▼ -0.826
Midwest (PADD2)	3.520	3.587	3.651	▲ 0.064	▼ -0.653
Gulf Coast (PADD3)	3.212	3.266	3.337	▲ 0.071	▼ -0.777
Rocky Mountain (PADD4)	3.612	3.620	3.635	▲ 0.015	▼ -1.029
West Coast (PADD5)	4.226	4.261	4.274	▲ 0.013	▼ -1.254
West Coast less California	3.797	3.841	3.874	▲ 0.033	▼ -1.136
California	4.719	4.742	4.734	▼ -0.008	▼ -1.385

*prices include all taxes

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

Crop Updates



In the aftermath of 2 devastating Hurricanes impacting growing operations in the Southeast, growers across the region continue to assess damage and repairing infrastructure. Tennessee, Georgia, and the Carolina's took the brunt of Helene with Central Florida taking a direct hit from Milton all within a couple of weeks. Given the impact from these two hurricanes fall supplies from the southeast will be severely impacted going forward to say the least. Numerous crops have been impacted (citrus, corn, cabbage, beans, eggplant, peppers tomato, squash, strawberries) among others, to what extent remains to be determined.



Hurricane Milton ripped through the Palmetto/Ruskin region of Florida, one of the maintomato growing regions normally set for harvests in late October and November. Early reports indicate substantial damage to crops in the region. To the south rains and strong winds from Milton have impacted the tomato crop in the Immokalee region set for December harvests. Heavy damage is likely as growers continue to assess damage across the region.



Add to this the extreme heat out west bringing an early end to the California crop and weather conditions contributing to light production from Central Mexico, tomato supplies look to be at extreme levels likely until Sinaloa production begins around mid-December.



Given the circumstances (heat in the west hurricanes in the east) transition supplies of the numerous crops impacted by these weather events look to be problematic this fall.

TIM LYNCH
QUALITY ASSURANCE MANAGER