

The Source

Commodity of the Month - Avocado

MARKET ALERTS

Asparagus: Supplies are limited due to a port strike in Peru and high temperatures in Mexico, but improvements are expected by mid October.

Bell Peppers: Markets are rising slightly due to heavy rains in Georgia causing bloom drop and tighter supplies, while California pepper supplies are lighter and demand has increased prices.

Blackberries: Availability remains limited until Central Mexico improves yields, expected in the third week of October.

Blueberries: Availability will remain extremely limited until increased arrivals from Peru and Central Mexico in mid-October, with ongoing port closures impacting supply levels.

Strawberries: Mexican season is expected to start in mid to late November, while California's heat wave may impact quality and yields, potentially ending the Salinas and Watsonville growing seasons early.

Oranges: Markets are strengthening with extremely limited supplies, particularly of Valencias, ahead of the domestic navel season starting October 21st.

Green Onions: Supplies are extremely limited due to heat in northern Mexico, with tight availability expected to persist for the next few weeks.

Tomatoes: Hurricane Helene severely impacted Eastern Tennessee and Western North Carolina, nearly wiping out the Tennessee tomato season and raising concerns about volatile markets.

OCTOBER 2, 2024

CROP UPDATES

Hurricane Helene caused significant damage from Florida to Tennessee, particularly in Tennessee and North Carolina, where flooding has devastated crops, especially tomatoes. Concerns are rising for upcoming harvests in Northern Florida and South Georgia. Early reports indicate minimal damage in Florida, but planting delays are expected. Further assessments will clarify the extent of the impact. [Read more](#)

WEATHER

Arizona - Temperatures may dip slightly today, but warmer-than-normal conditions will persist through the weekend, with highs reaching 100s and isolated spots reaching 110, with morning lows in the 70s.

California - The heat wave will gradually ease over the weekend, with temperatures remaining above average. Morning lows range from mid-50s to 70s, while daytime highs range from upper 70s to low 90s.

Florida - Showers are expected through tomorrow, with rainfall ranging from 0.02" to 0.20". From Friday to Sunday, wet weather increases due to moisture and a tropical disturbance. Heavy rainfall is possible, with highs in the mid-80s to near 90, cooling to the low to mid-80s.

Mexico - Temperatures will be slightly warmer and in line with seasonal averages through Friday, with highs in the low 70s to 80s and lows in the low 50s to near 60.

FREIGHT

Freight this week sees a demand for truck in the Parma, ID region due to influx of new crop apples competing with Onions and Potato new crop. We expect this trend to improve as we approach storage season.



IN PEAK SEASON



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Commodity Updates



Apples

The market remains mostly steady, with all major varieties now transitioning to the new crop, except for Pink Lady apples. While some storage crop inventories are still available, there is a limited supply of small-sized Granny Smith apples.

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



Asparagus



Asparagus supplies remain very limited on both coasts. Peru continues to face challenges due to a port strike, resulting in reduced shipments to the U.S. market. Additionally, high temperatures in Mexico are causing growth to go dormant, further constraining supplies. However, we anticipate improvements in availability by the second week of October.

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



Avocados

Markets are rising for 60ct and 70ct as the size distribution shifts toward 48ct due to the heavy rainfall in Mexico. The Adventajada crop is anticipated to begin in the coming weeks, with peak sizing and the official start date yet to be determined.

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



Bell Peppers



Markets are showing a slight upward trend. As Canada, Michigan, and other local deals wrap up, Georgia has experienced over 12 inches of rain and strong winds, leading to bloom drop and anticipated tighter markets with notable gaps as we transition into fall. California pepper supplies are lighter, and increased demand has driven prices higher. While quality remains good, sizing has decreased. Red bell prices are holding steady at current levels.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

ALERT

There have been no significant changes from last week regarding this item. Availability remains quite limited until Central Mexico starts to yield better numbers, which is anticipated around the third week of October.

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



Berries (Blueberries)

ALERT

Availability will remain extremely limited until we see an increase in arrivals from Peru and Central Mexico in the third week of October. Peruvian imports are currently arriving in very limited quantities and are selling out quickly. Ongoing port closures due to striking dock workers are further impacting supply levels. However, we anticipate an increase in crossings from McAllen, TX, in the next two weeks.

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



Berries (Raspberries)

Steady arrivals from Baja and Central Mexico are maintaining a flat market, with expectations for increased volumes as we approach late October. In McAllen, TX, we're observing small but consistent shipments being sold FOB. An uptick in transferred products is anticipated in the next 2 to 3 weeks, coinciding with the ramp-up of the Mexican strawberry season.

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



Berries (Strawberries)

ALERT

The Mexican season is expected to start in mid to late November. In California, a heat wave extending into the weekend is impacting quality and may soon negatively affect supplies. Due to heat advisories, crews will be working reduced hours, which could lead to lower yields. Such weather events, typically seen in October, may result in an earlier-than-usual conclusion for the Salinas and Watsonville growing areas, which normally continue into late October.

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

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

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Commodity Updates



Broccoli

Broccoli supplies remain somewhat limited this week due to insect pressure at the field level. As a result, expect the market to stay slightly elevated as we head into the weekend.

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



Brussel Sprouts

The sprout forecast shows no significant changes, with volumes expected to remain steady and robust over the next few weeks. The open market appears oversupplied, leading to low pricing and competitive deals. Overall quality is good, though some insect damage may occasionally be observed. Both the Virginia and bulk pack categories should have extra capacity, making this an excellent opportunity for promotions.

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 remains the primary growing region and is expected to continue through early November. While jumbos and cellos are in limited supply with rising prices, regular business is still being managed. There is ample availability of baby and snack packs, which aligns well with the return of students to school.

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 anticipated to remain strong throughout the week, with quality reported as fair to good. Expect the market to stay stable as we head into the weekend.

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



Celery

There is strong availability of this commodity, which is expected to persist throughout the week. Overall demand is soft, leading shippers to flex on larger sizes, particularly 24 counts. The quality remains consistently high, with the best deals available in the Oxnard/Santa Maria region. Additionally, moderate availability will continue in Salinas.

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

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

Key Partners



Commodity Updates



Citrus (Grapefruit)

The extreme heat has brought the domestic grapefruit season to a close. We anticipate a one-month gap before Desert Rios become available in October.

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



Citrus (Lemons)

Markets remain steady overall. District 2 (Oxnard/Ventura County) ships year-round, but supplies are decreasing, with quality ranging from fair to good. Meanwhile, District 3 (CA Desert/AZ) is ramping up production, and we can expect improved quality as the new crop fruit comes in.

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



Citrus (Limes)

The market continues to decline, but supplies are on the rise as new crop fruit comes in, particularly smaller sizes in the 230/250ct range. Availability of larger sizes, such as 110ct and 150ct, remains limited. However, quality is improving as we progress further into the new crop cycle.

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



Citrus (Oranges)

ALERT

Markets are strengthening, but supplies will be extremely limited for the next few weeks. Valencias are currently available in the Central Valley and Riverside areas, but contracts take priority, leading to allocation due to reduced supplies. Several shippers finished packing Valencias last week, further tightening supplies and driving up prices. Most shippers will gap before the domestic navel season begins on October 21st. Quality is fair, typical for this time of year, with reports of early decay, soft fruit, and skin breakdown due to the extreme heat. We'll keep you updated if any shippers can harvest earlier.

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



Cucumber

Western supplies are robust, with availability from both Nogales and Baja, and quality is strong. However, in the East, heavy rains and winds have caused significant flooding in Georgia and North Carolina, impacting the growing regions. Growers are working diligently to harvest as much as possible to salvage their crops. While there will be adequate supply in the short term, we anticipate this will be temporary, leading to higher market prices next week.

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

Markets are relatively steady, but we anticipate a tightening of East Coast supplies following Hurricane Helene, which brought heavy rain and winds to the region. Supplies remain stable for now, particularly for shipments coming from the Fresno area.

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



Garlic

California garlic is in full production, with good quality and strong supplies anticipated to continue in the coming weeks.

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)

The market is stable, with very few medium-large options available. However, there are strong supplies of large, extra-large, and jumbo sizes, all maintaining excellent quality.

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

ALERT

Green onion supplies remain extremely limited due to the heat affecting the northern Mexico growing region. Expect tight availability to continue for the next couple of weeks.

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



Kale

Kale supplies are anticipated to remain robust this week, with the market expected to stay 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 remains low, but warm weather has led to strong production. Expect steady supplies throughout the week from multiple shippers, with good weights averaging between thirty-eight to forty-four pounds. While there are minor reports of slight puffiness and misshapen heads, these issues are minimal. Several suppliers are accommodating volume-type orders, so we encourage you to promote as much as possible. However, anticipate that this market will tighten in the coming weeks.

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, along with green and red leaf varieties, will have robust availability throughout the week, with steady supplies of romaine hearts as well. However, reports of fringe and tip burn have emerged, attributed to the heat in the Salinas Valley and elevated temperatures in the southern regions. Fortunately, the weights on all leaf items remain favorable. Please note that shippers are adjusting their allocations, so be aware of potential changes. Like lettuce, this market is expected to tighten in availability over the next week or two.

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



Lettuce Tender Leaf

Tender leaf items have been in good supply and have shown fair to good quality recently. However, the ongoing heat wave in the Salinas Valley is expected to impact both quality and yields over the next few weeks. As a result, anticipate upward movement in the markets for cilantro, arugula, spinach, and parsley 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 cantaloupe market remains steady, with excellent quality reported for the California crop. Harvest figures have improved this week due to the heat wave, but expect a decline next week as the California harvest wraps up. While larger sizes are readily available, growers have limited quantities of smaller melons. Load volume deals are available as retailers aim to finish the "summer crop" strong. California production is set to continue through October 15, after which Yuma product will become available.

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 stable as supplies continue to increase. There is improved sizing available, though honeydew 8s remain limited. Additionally, the Arizona crop has begun to come in.

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

Watermelon supplies are beginning to decline as cooler weather sets in and regional programs wrap up. However, there will still be supplies available through October, with new shipments expected to arrive from Nogales in mid-November.

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

Supplies are improving in the Northeast, while the rest of the country and Canada continue to experience limited availability.

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

Harvest is in its final stages, with the market softening for yellow and white onions, while staying firm for reds.

Commodity/Region	Supply	Price	Quality
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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 nearly finished, and it's time to transition to Washington supply. The market has softened slightly.

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

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

Key Partners



Commodity Updates



Pineapples

Suppliers are maintaining six-week averages, prioritizing contracted business. Costa Rican pineapples are facing challenges due to insufficient rainfall in the tropics and ongoing port strikes. The new crop is expected to reach the U.S. by mid-October, but larger fruit remains difficult to source. Meanwhile, Mexican pineapples are becoming more available in the U.S. as quality improves in the growing regions.

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



Potatoes

There's an abundant supply of 40-70 CT Norkotahs, while Non-A and #2 grades remain limited and priced higher. Overall, quality is excellent.

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



Squash

Western supplies are strong with good availability from both Nogales and Santa Maria, and quality remains solid. In the East, Georgia and North Carolina have been impacted by heavy rains and winds, leading to significant flooding in key growing regions. Growers are working hard to salvage as much as possible, ensuring adequate supply in the short term. However, this is expected to be temporary, with tighter availability and higher markets likely next week.

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

Nectarines are nearly finished, with just a few scattered inventories left. Peaches are quickly winding down as the season comes to an end. Plums and some pluots are still available. Pomegranates are in full swing, and domestic kiwi have begun in small volumes, while imported kiwi remain tight. Asian pears are in good supply.

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



Tomatoes

ALERT

Hurricane Helene significantly affected Eastern Tennessee and Western North Carolina, leading to the near-complete loss of the Tennessee tomato season and substantial losses in Western North Carolina. Comprehensive assessments are expected to be available early next week. Prices have risen at other loading points, including Texas, California, Nogales, and Baja. There are concerns about potential supply gaps, as Quincy and South Georgia usually help bridge the transition to the Florida season. As a result, expect volatile markets in the coming weeks, along with rain-related quality issues.

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

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

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FRESH LINK



Weather Updates



CALIFORNIA

A weak low-pressure system moving north today will diminish high pressure and bring temperatures closer to average. Morning lows are expected to range from the mid 40s to upper 50s, with daytime highs reaching the 60s along the coast, mid 70s to low 80s in the coastal valleys, and mid 80s to low 90s south of King City. As the low system moves away, temperatures will rise above average again, peaking on Friday with maximums in the low to upper 70s near the coast and mid 80s to upper 90s inland. The high pressure will weaken over the weekend, cooling temperatures back to average under a deepening marine layer.



MEXICO

Warm seasonal temperatures are expected to persist with minimal changes through September 29th. Isolated shower activity will be generally light, with rain totals ranging from 0.02" to 0.20" in most instances, though some thunderstorms may produce higher amounts. Maximum temperatures will primarily be in the mid 70s to mid 80s through Thursday, dropping to the mid 70s to low 80s from Friday to Sunday. Overnight lows will range from the upper 50s to mid 60s through Sunday morning.



FLORIDA

Later today through Thursday, Tropical Storm Helene is expected to strengthen into a powerful hurricane as it approaches the Gulf Coast of Florida, particularly near the Big Bend. Showers and thunderstorms will become more frequent and widespread, leading to heavy rainfall, damaging hurricane-force winds, and significant flooding across the west coast of Florida and the Florida Panhandle. As the system weakens and moves northward, heavy rains are anticipated across Florida and the southeastern U.S. from Thursday into Friday.



ARIZONA

Excessive heat will persist throughout the weekend due to a strong high-pressure system. Daily afternoon highs will soar into the 100s, peaking at 112-113°F in Thermal through Friday, before cooling slightly by Sunday. Morning lows will remain in the 70s, accompanied by light, predominantly westerly winds.

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

Freight Updates



Freight this week sees a demand for truck in the Parma, ID region due to influx of new crop apples competing with Onions and Potato new crop. We expect this trend to improve as we approach storage season.



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

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

	09/16/24	09/23/24	09/30/24	Change from	
				week ago	year ago
U.S.	3.526	3.539	3.544	▲ 0.005	▼ -1.049
East Coast (PADD1)	3.585	3.577	3.571	▼ -0.006	▼ -0.971
New England (PADD1A)	3.818	3.797	3.788	▼ -0.009	▼ -0.819
Central Atlantic (PADD1B)	3.810	3.813	3.802	▼ -0.011	▼ -0.957
Lower Atlantic (PADD1C)	3.479	3.467	3.463	▼ -0.004	▼ -0.992
Midwest (PADD2)	3.481	3.511	3.520	▲ 0.009	▼ -0.929
Gulf Coast (PADD3)	3.172	3.191	3.212	▲ 0.021	▼ -1.067
Rocky Mountain (PADD4)	3.588	3.608	3.612	▲ 0.004	▼ -1.166
West Coast (PADD5)	4.244	4.239	4.226	▼ -0.013	▼ -1.468
West Coast less California	3.818	3.815	3.797	▼ -0.018	▼ -1.393
California	4.733	4.727	4.719	▼ -0.008	▼ -1.550

*prices include all taxes

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



Crop Updates

In the aftermath of the devastation from Hurricane Helene growers in the Southeast will continue to assess damage across the numerous regions. Farming operations from Florida to Tennessee have been impacted by this system. Areas of Tennessee and North Carolina are dealing with catastrophic flooding and power outages along with road and infrastructure damage. The remaining fall dry vegetable crops, especially the tomato crops, in these regions are likely a complete loss. There are many regional farming operations that have been impacted and it will take some time for crop assessments to take place. Of greatest concern currently are the upcoming fall crops in Northern Florida (Quincy) and South Georgia that are set for harvest around mid-October. In Georgia the eastern part of the state took the brunt of the storm damage with areas to the west impacted to a lesser degree. We anticipate quality challenges such as wind scarring and in the long-term plants may see a reduction in yields due to bloom drops and fields needing to be replanted. In Florida early reports expect minimal damage as many crops have yet to be planted, with Helene delaying current plantings for about a week. It is still too early to determine the full extent of damage as crop assessments continue.

Out west a significant heat wave will continue to impact most of California and the Southwestern Desert growing regions this week with temperatures 10-20 degrees. This heat wave will reach all the way to the coastal growing regions of the Santa Maria and Salinas Valleys that supply much of the late fall acreage. This will not help with the disease, insect and mildew problems in these fields. We will have to wait and see how this heat impacts the late season fields in these regions.

The Tropics remain active, and we are monitoring a system moving into the Gulf of Mexico this week as well as systems in the Atlantic. Given the recent weather events Fall supplies look to be problematic given the multiple regions impacted and numerous crops.



TIM LYNCH
QUALITY ASSURANCE MANAGER