

The Source

Commodity of the Month - Grapes

MARKET ALERTS

Avocado - Markets are slightly up. Mexican fruit ripens quickly, while California fruit ripens slowly and is entering the market in small quantities.

Lemons - Larger fruit sizes (115ct and above) are plentiful, while smaller sizes (165ct and below) will be scarce this summer. Demand for 140ct to 200ct fruit is strong and growing.

Oranges - Navel season is ending, and Valencias will peak at 72ct soon. Smaller sizes are scarce. Florida's season is nearly over with regreening issues.

Garlic - There is a shortage in the domestic market. The market is expected to become more volatile and tight in the coming months.

Iceberg Lettuce - Demand will outpace supply this week. Cool weather in Northern and Southern CA is reducing production. Prices for value-added items are rising, and there are reports of spongy and misshapen heads.

Lettuce Leaf - Romaine heart supplies have increased but remain limited. Cool temps are slowing production. There are reports of lighter weights and smaller sizes.

Lettuce Tender Leaf - Quality is affected by bacterial spotting due to rain and excessive moisture. Markets will remain tight for the next few weeks.

Cantaloupe - Offshore season season comes to an end, Cantaloupe demand has been strong. This is due to lower yields on domestic/Mexican products.

MAY 29, 2024

CROP UPDATES

Numerous factors are contributing to the current iceberg lettuce supply issues in California. Weather patterns have been the major culprit as cool temperatures along with a stubborn, deep marine layer, look to continue along the coastal valleys into early June. [Read more](#)

WEATHER

Arizona - Coachella Valley and Yuma Co. will reach 106-108 degrees on Monday, with temperatures remaining triple digits for most of the week, with daily lows in the mid-60s to mid-70s.

California - High pressure strengthens, weakening the marine layer and warming temperatures above average. Morning lows range from 30s to 50s, with highs in the 50s to 60s near the coast and 70s to 90s inland.

Florida - A cold front is expected today and a secondary cold front will push southward later in the week. Despite the frontal passages, temperatures over the peninsula will remain warm.

Mexico - Over the next five days, the area will experience isolated showers and t-storms, with rain totals ranging between 0.02" and 0.20", and warm temperatures until May 31st.

FREIGHT

Limited capacity and active truck market will continue this week after the Memorial holiday as trucks return to the California growing regions. Lack of backhauls are contributing to the demand for trucks as well.



IN PEAK SEASON



MARKET ALERTS

Onions - Market remains extremely active. Red onion pricing is extreme.

Pineapples - Tropical weather has caused fruit to mature faster than usual, resulting in lower yields.

Squash - Supplies are very limited, with Santa Maria experiencing a light start. shift in demand from MX to GA has reduced availability.

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Commodity Updates



Apples

Throughout the summer, you can expect a good supply of reds, Granny Smiths, and Fujis. In June, Pink Lady and Honey Crisp prices will gradually rise.

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



Asparagus

Despite limited supply, volume is starting to trickle in from Baja more consistently. Central Mexico is still about a month away from being fully operational. The current quality is good, and there are better supplies on the larger sizes.

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



Avocados

ALERT

There is a slight increase in markets. With fruit arriving in volume late-May/early-June, Peru is just around the corner. Peruvian fruit entering the US is expected to peak at 60/70ct, which is not normal. Due to the high dry matter content of Mexican fruit, ripening times remain short. California fruit is coming online in a light way with ripening time being longer due to lower dry matter.

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



Bell Peppers

Strong supplies out of the desert with good quality. As June approaches, crops will move to northern areas. In Georgia, supplies are plentiful and availability is good. Mexico's season is over this week. Late June will be the start date for Michigan.

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

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

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Commodity Updates



Berries (Blackberries)

Fruit from the Central Coast and Mexican transfers are available in California in good quantities. In the Central Valley Fresno area, activity is also on the rise. We will see steady production moving into the summer months, so now is the perfect time to promote this item. Mexican transfers are arriving daily.

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



Berries (Blueberries)

Markets are flat due to good volume coming out of the California Central Valley. The Georgia area is still going, but numbers will start to lighten as the season draws to a close. June/July should see a sharp increase in production numbers.

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



Berries (Raspberries)

After several months of very limited availability, production is begging to pick up. Markets should soften and open market availability should improve.

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



Berries (Strawberries)

Almost all shippers report very strong production on this item, keeping markets flat. During this post-holiday period of low demand, load volume pricing continues to be offered.

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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Driscoll's
Only the Finest Berries™



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Commodity Updates



Broccoli

Supply and quality of broccoli are good in Salinas and Santa Maria. The market is expected to remain steady over the weekend.

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



Brussel Sprouts

The quality and supply of Brussels sprouts remain excellent. This market is expected to remain steady next week.

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. With Bakersfield starting this weekend, Imperial Valley is the main region. The sizing looks good. No issues for the foreseeable future.

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



Cauliflower

Cauliflower is in good supply this week, as well as of good quality. Going into the weekend, the market is likely to remain steady with good supplies and quality.

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



Celery

The market is steady on all sizings and will remain so throughout the week. Although production is down in southern CA, shippers are meeting demand with most packs. Across the industry, the quality continues to be above average. As much as possible, promote 36-count packs with some shippers.

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

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

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Commodity Updates



Citrus (Lemons)

ALERT

Fruit is peaking on 115ct and larger sizes. There will be an extremely tight supply of 165ct and smaller sizes throughout the summer. District 1 (San Joaquin Valley) and District 2 (Oxnard/Ventura County) are both in play for larger fruit. The San Joaquin Valley is winding down, with Oxnard/Ventura County being the main region. There is a strong market for 140ct through 200ct and it is expected to continue to rise.

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



Citrus (Limes)

The market is steady. Large fruit still tight, peaking at 230/250ct. Offshore fruit production is declining as MX production rises.

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



Citrus (Oranges)

ALERT

The Navel season is ending; Valencia's will become the main variety within the few weeks. The Valencia crop will mirror the Navel crop. Fruit will peak at 72ct and larger; 88/113/138ct are extremely scarce and will remain so throughout the Valencia season. As of now, Riverside is the main growing region for Valencia's, with the Central Valley expected to start mid/end May. The quality of the Navels is good; the Brix ranges from 13 to 14. Valencia's are in the 12-12 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

It won't get to seasonal volume until mid-June, but availability is adequate with good quality. Due to recent rains, there are plenty of supplies out of Georgia, but a lot of offgrades. The quality is fair. Despite hot temperatures in the growing regions, Nogales supplies are adequate. By the end of next week, NC will be underway.

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



Eggplant

FL and MX are about to run out of supplies on both coasts. Georgia and California are the main regions now.

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

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

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Commodity Updates



Garlic

ALERT

There is a shortage of garlic in the domestic market. This coming week marks the beginning of the transition to Mexican peeled garlic. The garlic market is expected to become more volatile and tight in the coming months.

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)

The Mexican harvest is in full swing, and Chileans are heavily discounting to finish their season. Coachella is producing better than last week, but there are still limited supplies. As soon as the Chileans are out of the way, the Mexican deal should be finalized.

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



Grapes (Red)

The Mexican harvest is in full swing, and Chileans are heavily discounting to finish their season. Coachella is producing better than last week, but there are still limited supplies. As soon as the Chileans are out of the way, the Mexican deal should be finalized.

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



Green Onions

Green onion supplies this week are very good with better quality. Supplies should be good next week.

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



Kale

Kale supplies are expected to be plentiful and of good quality this week. Kale has a great opportunity to be promoted right now.

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 demand for this commodity will continue to exceed supply throughout the week. Northern and southern CA are experiencing cool weather, which is causing a drop in production. 32-36 pounds is a common weight being packed by multiple suppliers. Second-tier pricing on value-added items will continue to escalate throughout the week. There have also been reports of spongy and misshapen heads.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Light	\$\$\$	Fair
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Santa Maria, California (March-December)	Light	\$\$\$	Fair
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Salinas, California (May - October)	Light	\$\$\$	Fair
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Lettuce Leaf

ALERT

The demand for romaine, green leaves, and red leaves is moderate at best. There are still few Romaine hearts available, but supplies have increased since last week. The cool temperatures in the growing regions have slowed down production. Value-added Romaine items are escalated, but no other leaf items are escalated. There are reports of lighter weights and smaller sizes.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Light	\$\$\$	Fair
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Salinas, California (May - October)	Light	\$\$\$	Fair
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Lettuce Tender Leaf

ALERT

There continues to be a slight shortage of tender leaf items like cilantro and Italian parsley. As a result of all the rains and excessive moisture, Quality is dealing with bacterial spotting. For the next couple of weeks, these markets will remain tight.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Steady	\$\$\$	Fair
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Oxnard, California (Year Round)	Light	\$\$\$	Fair
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Salinas, California (May - October)	Light	\$\$\$	Fair
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Melon (Cantaloupe)

ALERT

As the offseason season comes to an end, Cantaloupe demand has been strong. This is due to lower yields on domestic/Mexican products. Mexican cantaloupes are available at a premium. In order to fulfill contract commitments, alternative labels and loading locations may be required. Brawley CA/Holtville region offers organics and specialty varieties.

Commodity/Region Supply Price Quality

Central America (December - May)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

Due to additional crossings from Mexico, the honeydew market has remained steady. Domestic and Mexican honeydews are peaking in smaller sizes (6/8), with limited larger sizes available. Due to a production gap, large honeydews are expected to be limited for the next 2-3 weeks. The gap was caused by rains in February impacting the growing schedule.

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. Northern Mexico's warmer weather has improved product quality and yields. The quality of Florida watermelons has improved, and additional supplies are expected next week.

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



Mushroom

Supply and availability remain excellent.

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



Onions

ALERT

Onions are available to load in multiple growing regions, however the market remains extremely active. Red onion pricing is extreme.

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. Bosc and Red Anjou are still available, but they will run out by the end of the month. In late June or early July, the green Anjou market will remain at higher prices until the supply is exhausted. Beginning 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

ALERT

Spot market opportunities are limited, so suppliers are focusing on their contracts. Tropical weather has caused fruit to mature faster than usual, resulting in lower yields. After the holidays, demand remains steady for larger fruit. There are good quality Mexican pineapples available.

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



Potatoes

It is higher to have 40 - 60 CT, and it is surplus to have 70 - 120 CT. Despite an increase in pressure bruising as we approach the end of the storage period, quality remains excellent.

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

There are very limited supplies. Santa Maria is scratching this week, but it is very light at the beginning. Crops need warmer temperatures, but coastal regions are experiencing light temperatures. Georgia is still dealing with the effects of rain from last week, but supplies are expected to rebound within a few days. However, the shift in demand from MX to GA has reduced availability.

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



Stone Fruit

Peaches, nectarines, apricots, and cherries are all in season. Red plums started this week, followed by black plums next week. Volumes and varieties will be better in June. The Kiwi market has leveled out and is steady.

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



Tomatoes

Now that more growers have started, Baja's volume is increasing. Crown peaks yield larger sizes with good quality. The Ruskin/Palmetto regions are winding down as Quincy prepares to bring on fruit in the next two weeks. In western MX, fruit is peaking in smaller sizes and quality is hit or miss. Meanwhile, production is picking up in Eastern Mexico.

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

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

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Weather Updates



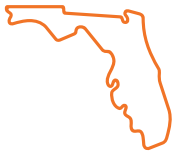
CALIFORNIA

Through the end of the week, high pressure strengthens over the area, weakening the marine layer and warming temperatures near to above average. Morning lows will range from the upper 30s to the low 50s. Highs early in the week will be in the upper 50s to mid 60s near the coast and low 70s to mid 80s inland, but as the high reaches its peak strength Thursday, max temperatures will be in the low-upper 60s near the coast and mid 70s to low 90s inland.



MEXICO

Over the next five days, isolated showers and t-storms will roam the area. In most showers, rain totals will range between 0.02" and 0.20", but higher totals are possible in some t-storms. The temperatures will remain warm until May 31st. Mostly upper 80s to upper 90s into the end of the week, but isolated spots may exceed triple digits. In the early morning hours, low temperatures will be mostly in the mid 60s to low 70s.



FLORIDA

Today, a cold front will pass through. In the latter half of the week, a secondary cold front will push southward as well. Throughout the weekend, isolated showers and a few t-storms are possible. Temperatures over the peninsula will remain warm despite the frontal passages as we move through the weekend.



ARIZONA

On Monday, Coachella Valley will reach 106-108 degrees, Yuma Co. will top off at 102-105, and central Arizona will reach similar temperatures. The week will see only a few degrees of cooling, so triple digits will persist for most. Daily lows will be in the mid-60s to mid-70s.

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

Freight Updates



Limited capacity and active truck market will continue this week after the Memorial holiday as trucks return to the California growing regions. Lack of backhauls are contributing to the demand for trucks as well.



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

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

	05/13/24	05/20/24	05/27/24	Change from	
				week ago	year ago
U.S.	3.848	3.789	3.758	↓ -0.031	↓ -0.097
East Coast (PADD1)	3.916	3.895	3.885	↓ -0.010	↓ -0.001
New England (PADD1A)	4.233	4.174	4.148	↓ -0.026	↑ 0.004
Central Atlantic (PADD1B)	4.155	4.114	4.123	↑ 0.009	↓ -0.067
Lower Atlantic (PADD1C)	3.794	3.785	3.770	↓ -0.015	↑ 0.023
Midwest (PADD2)	3.768	3.685	3.633	↓ -0.052	↓ -0.148
Gulf Coast (PADD3)	3.559	3.490	3.478	↓ -0.012	↓ -0.077
Rocky Mountain (PADD4)	3.791	3.746	3.706	↓ -0.040	↓ -0.371
West Coast (PADD5)	4.551	4.495	4.449	↓ -0.046	↓ -0.091
West Coast less California	4.053	4.012	3.982	↓ -0.030	↓ -0.323
California	5.123	5.049	4.985	↓ -0.064	↑ 0.175

*prices include all taxes

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

Crop Update

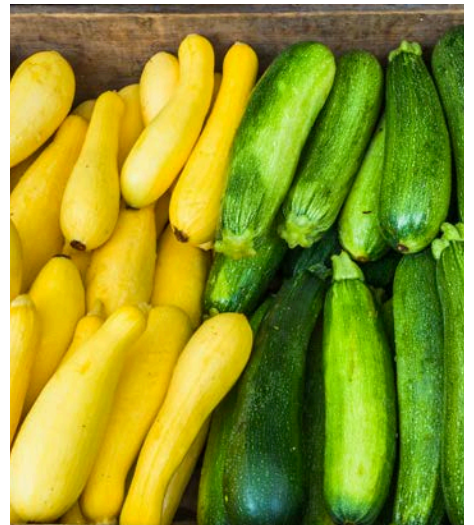


Numerous factors are contributing to the current iceberg lettuce supply issues in California. Weather patterns have been the major culprit as cool temperatures along with a stubborn, deep marine layer, look to continue along the coastal valleys into early June.

Sclerotinia, mold, mildew and disease pressure continue to impact romaine and iceberg production with lighter yields as growers work through affected acreage. Iceberg production continues to show smaller head sizes with less solidity/density contributing to lighter carton weights. Growers reaching for supplies are entering these stands early to meet current demand, leaving less available acreage as harvests roll on.

Soft squash and bean production in Georgia was hit by heavy precipitation and strong winds over the past week or so causing some bloom drops and severely impacting production. Out west Sonora Mexico has ended squash production a bit early as the California desert regions begin light production. Domestic production from Central California (Santa Maria) and North Carolina is expected to begin harvesting in early June adding to overall squash supplies.

Another factor currently impacting overall supplies is the ongoing drought in Mexico. About 40% of the country's dams are below 20% of capacity and another 40% are between 20 and 50% of capacity. Hot temperatures continue throughout the various regions as growers wait/pray for rainfall. It has been a slow start to the rainy season which typically runs from May-September. Growers are attempting to cut water use by picking heavy and ending harvest cycles early. With light overall production coming from Mexico demand has shifted to California for supplies. This will keep pressure on California supplies for the near term until the eastern states begin local/regional production in the next few weeks.



TIM LYNCH

QUALITY ASSURANCE MANAGER