

The Source

Commodity of the Month - Grapes

MARKET ALERTS

Avocado - Triggers apply for 48ct, 60ct, and 70ct sizes, with markets steady. Peruvian fruit expected in late-May/early-June, with ripening times short in Mexico and longer in California.

Blueberries - Baja fruit is being imported to support West Coast supplies, while Peruvian fruit remains available. Florida and Georgia crops are peaking, with strong numbers being distributed West for consolidation.

Lemons - Peak size ranges from 115ct to 140ct, with districts 1 and 2 playing, and sizes smaller than 140ct are extremely tight.

Oranges - Valencia fruit is peaking, but scarce 88/113/138ct is expected. Valencia's crop will mirror Navel's, requiring flexibility in size and grade. Orders must be 5-7 days in advance.

Iceberg Lettuce - Production in Salinas and Santa Maria faces yield impacts due to weather conditions. Supply improvement expected this week, value-added items on escalators, and pricing gap.

Lettuce Leaf - Light supplies of romaine, green and red leaf, and Romaine hearts are predicted for the week due to anthracnose issues, with limited availability and fair quality.

Onions - Better supplies of yellow and white onions. Red onion supply is limited and pricing is extreme. New crop onions have a rougher appearance with flakey skins and higher pulp temperatures.

MAY 1, 2024

CROP UPDATES

As we move through spring harvests various areas will add to supplies as new growing regions come into play and citrus, avocado, and stone fruit harvests gain momentum. [Read more](#)

WEATHER

Arizona - Moderate southerly winds will gust 15-20mph through Friday, with temperatures above normal. Fields will have highs in the 90s, lows in the 50s and 60s, and a cold front on Sunday.

California - Temperatures will gradually warm over the rest of the week due to strengthening high pressure. Onshore winds will remain breezy, with lows in the upper 30s to low 40s. Light to moderate rain is expected, with cooler temperatures on Saturday. High pressure will prevent much warming on Sunday.

Florida - Warm temperatures in Florida are expected over the next five days, with isolated showers and t-storms possible. Winds will gust between 15-20 mph over Tampa and 20-25 mph over southeast Florida.

Mexico - Warm temperatures in most areas will increase by 2-5 degrees over the weekend, with isolated showers and T-storms possible in South-Central Mexico, with highs in the upper 80s to mid 90s.

FREIGHT

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Commodity Updates



Apples

The apple market overall is mostly steady with a few varieties increasing in price. Fujis and Pinks are no longer in an oversupply situation, as Galas and Golds continue to advance.

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



Asparagus

Due to seasonality, asparagus production from Caborca and San Luis Mexico continues to decline. This week should be the end of their season. Mexico and Oregon continue to have low production levels. Peru's production continues to increase. The markets remain slow, except for XLs and Jumbos.

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



Avocados

ALERT

Triggers are in effect for 48ct, 60ct and 70ct sizes. The markets are steady at high levels. Peru is just around the corner, with fruit expected in volume late-May/early-June. It is expected that the size of the Peruvian fruit coming into the US will peak at 60/70ct, which is not normal. Because Mexican fruit has a high dry matter content, ripening times are 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)	Light	\$\$\$	Good
California (April - July)	Light	\$\$\$	Good



Bell Peppers

The overall market is steady. Nogales has a few more weeks left in its deal, and quality is starting to deteriorate. Green bell peppers have been planted at Coachella in a light way, and red bell peppers will be planted toward the end of May. Coachella offers better quality. Florida has steady supplies of good quality. Prices are low due to strong supplies of colored bell peppers with Canada now in full production.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

Supplies remain light but steady. As the weather warms up, we should see an increase in production leading up to Mother's Day. Georgia production is steady. Mixed berry consolidation supplies are still being sent to the West Coast in limited quantities.

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



Berries (Blueberries)

ALERT

More Baja fruit is being imported to support West Coast supplies, while some Peruvian fruit is still available. Florida and Georgia crops are peaking and volume pricing is available upon request. Strong numbers are crossing out of this area and being distributed West for consolidation.

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



Berries (Raspberries)

Product is being transferred from Baja and CMEX into California in very light numbers. The light numbers are leaving this area and being distributed west to be consolidated.

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



Berries (Strawberries)

California production is ramping up in all districts just in time for Mother's Day. Due to ideal growing conditions, all areas are producing good solid quality. There are excellent promotional opportunities on long stem berries and conventional pack styles for the next few weeks.

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

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

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Commodity Updates



Broccoli

Salinas and Santa Maria continue to have good broccoli supplies and quality this week. Going into the weekend, expect this market 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 sprouts are in good supply. 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

The whole carrot market is steady. Imperial Valley is now the main growing region. The size looks good. No issues for the foreseeable future.

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



Cauliflower

With the recent cooler weather, cauliflower remains on the tighter side. Going into the weekend, I do not expect this market to go higher.

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



Celery

Overall, this market is firm. Oxnard/Santa Maria continues to have ample supplies to meet demand. The Mother's Day pull should be fairly strong starting next week. All sizes are available, but large sizes continue to be the most readily available. It is expected that the quality will remain good. Only slight seeder is being reported. Value-added items are currently being priced higher.

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

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

Key Partners



Commodity Updates



Citrus (Lemons)

ALERT

The overall peak size is 115ct and larger. The districts 1 and 2 are in play. Sizes smaller than 140ct are extremely tight.

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



Citrus (Limes)

One last push for Cinco de Mayo weekend led to slightly higher prices this week. The fruit peaks at 230/250ct, with larger sizes 110/150ct more limited. It is forecast that volume will increase post Mother's Day with lower prices.

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



Citrus (Oranges)

ALERT

In Valencia, fruit on 72ct and larger continues to peak; 88/113/138ct are extremely scarce and will remain so throughout the season. As navel supplies dwindle, Valencia will be the main variety within the next few weeks. Valencia's crop will mirror Navel's. As we navigate through this Valencia season, please be flexible with size and grade. The lead time is very important; please send orders 5-7 days in advance. The quality is good.

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



Cucumber

The prices are slightly lower, but the quality is good. Nogales, McAllen, and Florida are available. Baja will start later this month and Georgia is right around the corner.

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



Eggplant

Nogales has moderate supplies, while Florida has light supplies. Prices remain stable due to light demand. We'll see new crop eggplant later this month from the CA Desert and Georgia.

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

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

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Commodity Updates



Garlic

Garlic supplies domestically remain tight. There has been a good harvest of Argentinian garlic in South America in recent months. This will not, however, fill the overall supply gap. Over 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)

Grape imports will remain tight through the end of the Chilean deal in early May. Currently, the west coast has an easier market than the east. Shippers are projecting a mid-May start for Mexico. There is cautious optimism that there won't be a gap.

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



Grapes (Red)

Grape imports will remain tight through the end of the Chilean deal in early May. Currently, the west coast has an easier market than the east. Shippers are projecting a mid-May start for Mexico. There is cautious optimism that there won't be a gap.

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



Green Onions

The quality of green onions is improving this week. We can expect good supplies going into 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. 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

Production continues to be based in Salinas and Santa Maria. As a result of recent weather conditions, yields have been impacted, but supplies are expected to improve this week due to better weather conditions. For the remainder of the week, all value-added items will be on escalators. There have been reports of discoloration, misshapen heads, and erratic weights upon arrival. Please be aware that there is a gap in pricing, industry-wide. Expect this market to ease up after Mother's Day, industry-wide.

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

It is predicted that there will be light supplies of romaine as well as green and red leaf for the entire week. Escalated pricing is in effect for value-added products. There has been a continued issue with anthracnose that has lowered yields in the field. Quality remains fair at best. There will be very limited availability of Romaine hearts throughout the week as well. All leaf items have been reported with black and brown spotting as well as pink discoloration. After Mother's Day, new fields will begin to be harvested, improving quality.

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



Lettuce Tender Leaf

Arugula and spinach are in good supply this week. Due to low yields and fair quality, Italian parsley is still limited.

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



Melon (Cantaloupe)

Retail promotions are keeping demand strong, and offshore has excellent quality. Brix levels offshore remain higher with minimal scarring. Growers are monitoring the quality levels of Mexican cantaloupes this week. Starting on 5/13, specialty varieties will be available.

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

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

Key Partners



Commodity Updates



Melon (Honeydew)

Supply of honeydews has increased and the market is beginning to normalize. Melons from offshore are still peaking on larger sizes while Mexican honeydews are hitting the market.

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



Melon (Watermelon)

With additional suppliers available from Nogales, the watermelon market has normalized. Only a limited amount of watermelons are available from Florida, and there are restrictions on where they can be shipped. Florida's production has been delayed due to lower yields caused by harvesting issues.

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



Onion supplies are ramping up for the new crop. Yellow and white onions are in better supply and prices are easing. Red onion supply is limited and pricing is extreme. Be aware of appearance differences with new crop onions. New crop onions have a rougher appearance with flakey skins and higher pulp temperatures.

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

There are only anjous left, along with a few pockets of red pears and bosc. The anjou market is steady at higher prices and will remain so until California Bartletts starts in mid-July.

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

Despite limited spot market opportunities, suppliers are focusing on their contracts. Tropical weather has caused fruit to mature faster than normal, resulting in lower yields. It is expected to last through Mother's Day. 6ct crowned and 7ct crownless pineapples have been impacted.

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

The number of 40 CT remains limited and the price is high. Storage is peaking at 90 CT. Stocks of storage remain excellent.

Commodity/Region	Supply	Price	Quality
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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

As squash is available in multiple regions, squash markets are steady at lower levels. Since yellow squash is more susceptible to weather than zucchini, it is a more limited variety. Nogales, California, Florida, and Georgia all have availability.

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



Stone Fruit

The California stone fruit season has started slowly, with just a few ranches picking apricots, cherries, and peaches. Over the next 2-3 weeks, volume will increase rapidly. In 2 weeks, nectarines will begin to produce volume, followed by plums in June.

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

The markets are steady at elevated levels. Particularly on round and Roma varieties. The Florida spring crop will start in the next few weeks, hoping to relieve eastcoast demand. Sinaloa is mostly done, and Sonora, Baja and Central Mexico will have more volume in the coming weeks. Cherry and grapes are still readily available.

Commodity/Region	Supply	Price	Quality
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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



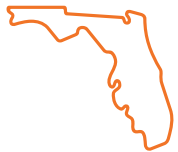
CALIFORNIA

During the rest of the work week, temperatures will gradually warm as high pressure steadily strengthens. Under moderate marine layer conditions, onshore winds will remain breezy with gusts up to 30 mph. Lows in the morning will be in the upper 30s to low 40s south of King City, and in the low 40s to low 50s elsewhere. Near the coast, highs will be in the low 60s to low 70s, while inland, they will range from the low 70s to mid 80s. There is a chance of light to moderate rain and cooler temperatures Saturday with rain totals under 13". A deep marine layer of cloudiness will prevent temperatures from warming much Sunday due to high pressure.



MEXICO

Over most spots, the warm temperatures today will warm by another 2 to 5 degrees as the weekend approaches. Over the higher terrain of South-Central Mexico, a few isolated showers and T-storms are possible. Max temperatures in the upper 80s to mid 90s through tomorrow and mostly low-upper 90s through the weekend. Through Sunday morning, low temperatures will be in the mid-50s to mid-60s.



FLORIDA

The state will experience warm temperatures over the next five days. There may also be a few isolated showers or a t-storm. Through Friday, winds will gust between 15 and 20 mph over Tampa and closer to 20 to 25 mph over southeast Florida.



ARIZONA

Across the low deserts, moderate southerly winds will gust to 15-20mph through Friday while temperatures remain near-to-above normal. Most fields will have highs in the low-mid 90s through Saturday, and morning lows will be in the upper 50s and low 60s. We'll see a cold front arrive Sunday afternoon, bringing highs down to the 80s and low 90s, as well as moderate to strong westerly winds (30-35mph).

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

Freight Updates



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

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

	04/15/24	04/22/24	04/29/24	Change from	
				week ago	year ago
U.S.	4.015	3.992	3.947	↓ -0.045	↓ -0.071
East Coast (PADD1)	4.068	4.047	4.025	↓ -0.022	↓ -0.048
New England (PADD1A)	4.311	4.326	4.309	↓ -0.017	↓ -0.187
Central Atlantic (PADD1B)	4.241	4.255	4.234	↓ -0.021	↓ -0.104
Lower Atlantic (PADD1C)	3.979	3.941	3.919	↓ -0.022	↓ -0.012
Midwest (PADD2)	3.965	3.935	3.882	↓ -0.053	↓ -0.035
Gulf Coast (PADD3)	3.710	3.707	3.657	↓ -0.050	↓ -0.097
Rocky Mountain (PADD4)	3.956	3.883	3.787	↓ -0.096	↓ -0.359
West Coast (PADD5)	4.702	4.661	4.625	↓ -0.036	↓ -0.056
West Coast less California	4.218	4.154	4.110	↓ -0.044	↓ -0.379
California	5.256	5.244	5.216	↓ -0.028	↑ 0.313

*prices include all taxes

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

Crop Update



As we move through spring harvests various areas will add to supplies as new growing regions come into play and citrus, avocado, and stone fruit harvests gain momentum.

Citrus: As the navel orange season winds down seasonally, production is showing mostly large sized fruit with smaller sizes 88s and smaller extremely scarce at pack out. Valencia's will become the major variety coming from California groves. The Valencia crop looks to mirror the navel crop with the fruit is showing a large size structure peaking on 72ct and larger with smaller sizes very short. This is due to a lighter fruit set and a strong winter providing plenty of precipitation in the groves. Quality is good with brix in the 13-14 range for navels and in the 11-12 range for Valencia's. Lemon supplies are in a similar position with the strong winter rains creating a larger size structure this season. The fruit is peaking at 115ct and larger with smaller fruit 165ct-200ct in limited supply this season. These crops will continue to grow through the season, further lessening the availability of smaller sized fruit.

Stone Fruit: Domestic stone fruit and cherry season is just around the corner with very light harvests of peaches and cherries this week. Production will continue to slowly gain momentum as we move through May. The winter provided the groves with excellent chill hours as the various regions received approximately 800 chill hours with above average rainfall. By all accounts the groves had a strong bloom and a nice crop set which will provide a good quality crop this season barring any late season weather disruptions.

Avocado: California harvests continue to increase seasonally peaking in late May/June time frame. Strong demand currently for the Cinco de Mayo promotions. The California crop is down approximately 30 million pounds this season due to unfavorable weather during the 2023 spring bloom and the alternate bearing nature of avocados. The trees bear fruit in two-year cycles of a large crop followed by a small crop. These factors will likely bring an early finish to the California season is expected to last 5 months instead of the normal 6-7 months. Mexico continues with good availability along most size speaking on 48s and 60s with a good supply of small (70s and 84s) fruit.

In the Salinas Valley, cool temperatures continue to hinder growth rates of the various crops. This along with the current disease pressure impacting yields will keep lettuce supplies on the lighter side for the near term at a minimum. 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 gain momentum. This may lead to some supply shortages in iceberg, romaine and cauliflower moving forward. Forecasts bring another cold storm system into Northern and Central California over the weekend with a chance of light rain winds and cooler temperatures. This will not be beneficial to overall crop growth rates, quality and supplies.



TIM LYNCH
QUALITY ASSURANCE