

The Source

Commodity of the Month - Grapes

MARKET ALERTS

Brussels Sprouts: The sprout market remains active with supplies below normal and strong demand. Open market prices are rising and are expected to continue increasing for the next 2-3 weeks.

Citrus (Lemons): Markets are firming as rain has boosted fruit size. 140ct and smaller sizes are tightening, with limited small fruit until District 2 increases volume in June. District 1 is the main growing region, while District 2 contributes minimal volume.

Citrus (Oranges): Markets remain strong as the Navel season winds down, set to end in June. Small fruit will stay limited, and suppliers are managing volumes while delaying Valencia shipments to ensure fall supply. Valencia harvest is expected to begin in early June.

Pineapple: Pineapple supply is tight due to high demand and vessel delays, causing shorts and order cuts. Crownless pineapples are particularly limited. Tight supplies are expected through the week, with improvement in the coming weeks.

IN PEAK SEASON



MAY 7, 2025

CROP UPDATES

Spring's temperature swings are slowing crop growth and increasing disease pressure in coastal California. Artichokes, Brussels sprouts, and green beans are all facing light supplies due to weather, disease, and regional transitions. [Read more](#)

WEATHER

California: The warming trend continues today with highs in the 60s to 80s. Temperatures will range from mid 60s to mid 70s along the coast and low 80s to upper 90s inland through the week. A cooling trend will begin by Sunday.

Mexico: Warm temperatures will continue through Thursday with mostly dry conditions. Cooler temps and scattered showers are expected later in the week, with rainfall between 0.05" to 0.20". Highs will be in the mid 80s to mid 90s through Thursday, cooling to normal levels Friday to Sunday with lows in the mid 50s to mid 60s.

Florida: Unsettled weather in Florida will bring heavier rains later in the week. Highs will be in the mid 80s to low 90s through Thursday, cooling to the low 80s to upper 80s from Friday to Sunday. Lows will range from the mid 60s to mid 70s through the weekend.

Arizona: Scattered showers will continue in central Arizona, with dry, warmer conditions elsewhere. Highs will range from mid 80s to 112°F by Saturday, with morning lows in the upper 50s to mid 70s. Winds will remain light and northerly.

FREIGHT

Truck market is active with Mother's day approaching. Primary US growing regions are seeing an increase in demand for trucks for this reason, as well as warmer temps, as summer approaches. Expect a continued, upward trend of truck demand through July 4th as we navigate Memorial Day.

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Commodity Updates



Apples

The apple market remains stable on the surface, but pressure is building. Most core varieties – Red Delicious, Gala, Fuji, Granny Smith – are holding steady, with ample foodservice sizes available. However, Cosmic Crisp and Honeycrisp are showing volatility. A surplus of oversized Cosmics has flooded the market, while smaller sizes are scarce. Honeycrisp, meanwhile, is down 35% amid tight supply and soaring prices. Market conditions are shifting – and fast.

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



Asparagus

Asparagus supplies are improving. Peru continues to increase volume, pushing prices down from recent highs. Mexican production is ramping up slowly in Baja as Caborca winds down. U.S. harvest has begun in Washington, with Michigan expected to start mid-May. Expect a continued downward trend in the market next week.

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



Avocados

Markets are beginning to ease as offshore volumes increase on both coasts. Supplies of 48ct and smaller fruit have improved, while larger sizes remain tight. The Normal crop has about 6-8 weeks remaining before the Flora Loca crop begins. Meanwhile, the California season is in full swing.

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



Bell Peppers

Market is firm. Still hit or miss out east with Georgia still 2 weeks out from first harvest. Out west Nogales is winding down with better #1 grade quality fruit out of California. New crop peaking on XL/Jumbo sizes out of the CA desert.

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

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

Supply Partners



Commodity Updates



Berries (Blackberries)

Supplies are gradually improving as warmer temperatures bring on more fruit. Organic volumes are arriving first, with conventional expected to follow in late May through early June. Mexican product continues to supply transfer fruit to U.S. distribution centers.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Steady	\$\$\$	Fair
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Berries (Blueberries)

Georgia production is increasing, along with small volumes from Florida. Mexican production remains limited. California blueberries are seeing slight increases, with supplies coming from both the Coastal California region and the Central Valley.

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



Berries (Raspberries)

This item will remain tight until West Coast production starts in late May or early June. In the meantime, shortages from Central Mexico are expected to continue over the next few weeks.

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



Berries (Strawberries)

Production is expected to increase in Salinas, Watsonville, and Santa Maria with warmer temperatures this week. Oxnard is nearing the end of its season, and volumes are decreasing. While the Mother's Day demand has eased, there is still steady demand heading into the weekend. Markets are anticipated to adjust lower next week.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Driscoll's
Only the Finest Berries™



Commodity Updates



Broccoli

Broccoli quality remains excellent, with fields showing strong color and sizing. The market is expected to stay steady heading into next week.

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



Brussel Sprouts

ALERT

The sprout market remains highly active, with industry supplies well below normal and strong demand. Open market prices continue to rise, and this trend is expected to persist for the next 2-3 weeks.

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



Carrots

Harvest in the Imperial Valley is progressing well, and the outlook remains positive. Lake Park, GA is shipping a variety of products, including chunks, cellos, jumbos, and babies, and is expected to continue through May, barring any weather disruptions. Please remember to submit snack pack orders 48 hours in advance.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	High	\$\$\$	Excellent
Kern County (October - Feb)	Steady	\$\$\$	Good
Various Northwest Regions (July - October)	Light	\$\$\$	Good



Cauliflower

Cauliflower quality remains excellent, with fields showing strong sizing and color. The market is expected to stay steady heading into next week.

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



Celery

Steady supplies are expected throughout the week for this commodity, with good quality reported across most shippers and minimal seeder issues. Shippers will continue to apply a delivery charge for pickups outside Santa Maria/Oxnard. For better pricing, plan to pick up in the Southern CA region rather than Salinas.

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

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

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Commodity Updates



Citrus (Grapefruit)

Ruby Reds are available, peaking at 40ct and larger sizes, and are being shipped from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

ALERT

Markets are firming up across the board as recent rain events have helped fruit size up. 140ct and smaller sizes are tightening, with small fruit expected to remain limited until District 2 increases volume around June. District 1 (San Joaquin Valley) remains the primary growing region, while District 2 (Ventura County/Oxnard) is contributing minimal volume.

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



Citrus (Limes)

The market is steady to slightly higher. Fruit is peaking on 230/250 sizes, with some quoting 275s. Large fruit remains very limited. Rain in the forecast may prompt early harvests, bringing more fruit to market. Offshore Peruvian and Colombian fruit is also available.

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



Citrus (Oranges)

ALERT

Markets remain strong as the Navel season winds down, expected to wrap up in June. Small fruit will stay limited through the end of the season. Suppliers are closely monitoring remaining Navel volumes to manage contracts while aiming to delay Valencia shipments to maintain supply through fall. Valencia harvest is expected to begin in early June.

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



Cucumber

The market is softening as newer regions begin production. Georgia and Baja have started, and output is expected to increase as the older crop phases out over the next few weeks.

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

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

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Commodity Updates



Eggplant

California eggplant has started as Nogales finishes up, with significantly better quality out of California, commanding a premium. Eastern eggplant remains tight as we await Georgia's production to begin.

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



Garlic

Garlic quality remains excellent, with supplies expected to stay strong 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)

Grape prices are continuing to rise, particularly for high-quality green grapes. What was once a two-tiered market has now narrowed to just the upper tier. Mexican new crop greens are expected to begin in 10-14 days, though volume will start light. Red grapes are also seeing price increases, but at a slower pace than greens, with wide variations in quality and price. Mexican red seedless is expected to start in the last week of May.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies remain steady, and the market is expected to stay consistent going into next week.

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



Kale

Kale supplies and quality remain strong this week, and this trend is expected to continue into next week.

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

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

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Commodity Updates



Lettuce Iceberg

Strong supplies are expected in the Salinas Valley this week, with moderate availability in Southern CA. Quality will be excellent, with average weights between 40-45 pounds. Seeder is minimal, and there is little to no discoloration on the outer leaves. Overall, industry-wide quality is very good. Shippers are flexible, so promotions are encouraged.

Commodity/Region	Supply	Price	Quality
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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

Romaine, along with green and red leaf, will have plentiful availability this week in the Salinas Valley, with steady supplies of romaine hearts. Shippers are flexible, so promotions are encouraged. Overall quality remains strong, with good weights, sizing, and texture, and no tip or fringe burn reported at this time.

Commodity/Region	Supply	Price	Quality
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Salinas, California (May - October)	Steady	\$\$\$	Fair
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Lettuce Tender Leaf

All tender leaf lettuce varieties are in good supply with excellent overall quality. Fields are showing consistent sizing, with strong texture and color. Supplies and quality are expected to remain steady through the weekend.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Steady	\$\$\$	Good
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Oxnard, California (Year Round)	Steady	\$\$\$	Good
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Yuma, AZ (Nov. - May)	Steady	\$\$\$	Good
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Melon (Cantaloupe)

The Cantaloupe market is strong due to recent retail ads. Offshore Melons are peaking on 9s and are on the tail end of the season. Mexican cantaloupes and honeydews are also peaking on large sizes. The Domestic Melon season is on pace to start last week of May if not sooner.

Commodity/Region	Supply	Price	Quality
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Central America (December - May)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Supply Partners



Commodity Updates



Melon (Honeydew)

The Honeydew market is steady due to recent retail ads. Honeydews from Guatemala are impacted by the universal tariffs and price strategies are being reviewed. Mexican honeydews are also peaking on large sizes. The introduction of new fields from Mexico has helped the market. The Domestic Melon season is on pace to start last week of May if not sooner.

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



Melon (Watermelon)

Mexican watermelon supplies have been increasing just in time for the Mother's Day pull. The quality is strong, and aggressive bin/carton pricing is available.

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



Mushroom

Supplies and availability are excellent for both brown and white varieties.

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



Onions

Storage onion production from the PNW is nearly finished, with the Texas crop also wrapping up soon. Mexican crossings will continue through July. Brawley, CA has all three colors available, as does Georgia. Jumbo white onions remain limited and are being imported from other regions and Mexico.

Commodity/Region	Supply	Price	Quality
Eastern Orgeon/Parma, ID (August - April)	High	\$\$\$	Excellent
San Joaquin Valley (May - August)	Light	\$\$\$	Good
Tri-Cities, Washington (July - April)	High	\$\$\$	Good



Pears

Domestic pear supplies are critically low and unlikely to improve before mid-July, when California's Bartlett crop is expected to begin – weather and conditions permitting. Washington's output has been severely impacted, down 25–50% depending on the region. Bosc supplies are nearly gone, leaving Anjou as the primary domestic option. Meanwhile, imported pears are arriving on both coasts, offering reliable volume for buyers less concerned with origin.

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

Pineapple supply remains tight with high demand. Vessel delays caused some shipments to miss their schedule, resulting in shorts and order cuts this week. Crownless pineapples are especially limited due to additional labor and sizing requirements. Expect tight supplies for the remainder of the week, with improvement anticipated in the following weeks.

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



Potatoes

The market remains steady this week with stable pricing. Distributors are showing increased interest in DLVD over FOB pricing. Deals are available as suppliers clear out storage crop ahead of new crop arrivals. Planting is underway across most regions, including Eastern Idaho. Interest is growing in California-colored potatoes as quality declines in other areas. Demand for Yellow potatoes is also trending upward across the board.

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



Squash

Supply remains strong in most areas, particularly on zucchini, though yellow squash is still slightly behind, which is typical. Product is available from California, Nogales, Georgia, and Florida, with promotable volumes ready for distribution.

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



Stone Fruit

Domestic stone fruit season has begun, with initial volumes of peaches arriving this week and nectarines expected next week. Plums will follow in early June. Apricots and cherries have started in light volume, with pricing currently strong. Imported peaches and nectarines are finished for the season, and imported plums are nearly done. The kiwi market remains steady, supported by imports from Italy, Greece, and ongoing shipments from Chile.

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



Tomatoes

The market is steady, with romas slightly tighter but still available. Overall quality is good. Product is available from Baja, Nogales, McAllen, and Florida. Promotable volume is available, especially on round tomatoes, with strong production in most areas.

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

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

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Weather Updates



CALIFORNIA

The warming trend continues today as high pressure strengthens, easing marine layer conditions. Morning lows will range from the upper 30s to low 50s, with daytime highs reaching the low 60s to low 70s along the coast and low 70s to mid 80s inland. For the rest of the week, maximum temperatures will range from the mid 60s to mid 70s near the coast and low 80s to upper 90s inland. By Sunday, an approaching low will initiate a cooling trend.



MEXICO

Warm temperatures will persist through Thursday with mostly dry conditions. Slightly cooler temps and a chance for isolated to scattered showers will develop later in the week, with rainfall ranging from 0.05" to 0.20", and higher totals possible in thunderstorms.

Highs will reach the mid 80s to mid 90s through Thursday. From Friday to Sunday, temperatures will cool slightly, approaching normal levels, with showers limiting daytime heating in some areas. Lows will be in the mid 50s to mid 60s through Sunday morning.



FLORIDA

Unsettled weather is expected over the Florida peninsula, with heavier rains possible later in the week. Temperatures will cool slightly as clouds and showers limit daytime heating. Highs will be in the mid 80s to low 90s through Thursday, then drop to the low 80s to upper 80s from Friday through Sunday. Lows will range from the mid 60s to mid 70s most mornings through the weekend.



ARIZONA

Scattered showers will continue across central Arizona this afternoon, but dry conditions and a warming trend are expected elsewhere. Highs will range from the mid to upper 80s in most valleys, reaching 100-107°F by Friday afternoon, and peaking Saturday at 100-107°F in Arizona and 105-112°F in southeast California.

Morning lows will be in the upper 50s to low 60s on Wednesday, warming to the low to mid 70s by Saturday, with mid 70s expected in most valleys on Sunday. Winds will remain light and northerly throughout the weekend.

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

Freight Updates



Truck market is active with Mothers day approaching. Primary US growing regions are seeing an increase in demand for trucks for this reason, as well as warmer temps, as summer approaches. Expect a continued, upward trend of truck demand through July 4th as we navigate Memorial Day.



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

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

	04/21/25	04/28/25	05/05/25	Change from	
				week ago	year ago
U.S.	3.534	3.514	3.497	↓ -0.017	↓ -0.397
East Coast (PADD1)	3.614	3.585	3.567	↓ -0.018	↓ -0.399
New England (PADD1A)	3.933	3.908	3.895	↓ -0.013	↓ -0.382
Central Atlantic (PADD1B)	3.819	3.806	3.796	↓ -0.010	↓ -0.412
Lower Atlantic (PADD1C)	3.505	3.470	3.448	↓ -0.022	↓ -0.398
Midwest (PADD2)	3.475	3.456	3.432	↓ -0.024	↓ -0.382
Gulf Coast (PADD3)	3.195	3.183	3.174	↓ -0.009	↓ -0.443
Rocky Mountain (PADD4)	3.477	3.470	3.460	↓ -0.010	↓ -0.325
West Coast (PADD5)	4.250	4.224	4.204	↓ -0.020	↓ -0.376
West Coast less California	3.813	3.777	3.750	↓ -0.027	↓ -0.329
California	4.755	4.740	4.728	↓ -0.012	↓ -0.427

*prices include all taxes

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

Crop Updates



The roller coaster of temperatures, typical of spring, looks likely to continue across the coastal California fields as we move through May. As low pressure systems pass mainly to the north, they bring cooler temperatures along with a heavy marine layer and drizzle to the fields. Intermittent high pressure then brings warm temperatures and a shallow marine layer for a short period followed by another round of cooler temperatures, fog and drizzle. The cooler temperatures will slow growth rates while increasing mold, mildew and disease pressure in these stands. Some of the mature lettuce and leaf stands are showing some disease pressure producing lighter yields in upcoming stands. Of particular concern now are supplies of artichokes, brussels sprouts and green beans.



Artichoke production looks to remain on the light side as growers transition to Salinas Valley fields. The cool moist weather in these coastal fields has hampered production with mold and mildew impacting yields in the stands.



Brussels sprout supplies from Mexico are past peak production and continue to deal with hot weather, labor challenges and border crossing issues. Current production is mainly medium sized sprouts with small and jumbos very limited. Seeder and discoloration are being reported as the Oxnard region looks to begin light production.

Green bean production from Mexico is winding down over the next couple of weeks with questionable quality and light volume. As south Florida winds down seasonally Northern Florida and Georgia are expected to add to the mix this week gradually increasing production. California desert production is expected to bring better supplies as harvests begin around mid-May.



TIM LYNCH

QUALITY ASSURANCE MANAGER