

The Source

Commodity of the Month - Carrots



MARKET ALERTS

Avocado - Markets rise amid 60ct and 70ct triggers, Cinco De Mayo pull, Peruvian fruit arrival, Mexican fruit ripening, and California fruit light online.

Cauliflower - Supply is tight due to cooler weather slowing growth, causing fields to lag behind, and the market is expected to remain high into next week.

Lemons - The peak size is 115ct and larger, with District 1 being the main growing region. Sizes smaller than 140ct are extremely tight.

Oranges - Fruit is peaking at 72ct and larger, scarce at 88/113/138ct due to low set and rain events. Orders are flexible, quality 12-14, and require 5-7 days lead time.

Iceberg Lettuce - Salinas and Santa Maria lettuce growers face anthracnose issues, causing quality issues and higher prices for value-added items through April.

Lettuce Leaf - Yuma and Huron are finished, Salinas and Santa Maria/Oxnard produce minimal romaine. Quality issues due to anthracnose affect Salinas, leading to fair yields.

Onions - The new crop of onions is boosting supplies, with extreme prices for reds and decreased prices for yellows and whites.

APRIL 24, 2024

CROP UPDATES

Row crop production in California's coastal valleys is facing challenges due to cool, moist conditions, allowing mold, mildew, and disease to thrive. Sclerotinia, bottom rot, and anthracnose are affecting iceberg production, with up to 20% of romaine acreage potentially affected. [Read more](#)

WEATHER

Arizona - A cold front from the north will cause a cooling trend through Saturday, with no rainfall. Westerly winds will increase significantly, with gusts of 22-28mph, 30-35mph, and 35-40 mph. Valleys will be in the mid 80s to low 90s.

California - Deep marine layer conditions and gusty onshore winds are expected to cause sporadic drizzle and below-average temperatures, with high pressure returning over the weekend.

Florida - High pressure is forecasted in Florida today, with a cold front stalling north. Later, warmer temperatures from the Atlantic coast will push through, with occasional gusts of 20-30 mph.

Mexico - Throughout the weekend, the region will experience mostly dry weather, with light showers in South-Central Mexico. Warm weather will persist until April 28, with high temperatures in the mid 80s to 90s.

FREIGHT

Warmer weather and increased supplies in the west are alleviating shipper delays in Salinas, but outlying growing regions in California are still producing Berries, causing extra miles between pickups and transit delays.



IN PEAK



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Commodity Updates



Apples

You can expect good supplies of most apple varieties in April and into May. Two notable exceptions are Gala and Gold Delicious. Golds have started their seasonal decline in volume as shippers reach the end of their storage deal. With more storage tonnage to go, Galas are a very popular variety with a consistent demand. We should have galas until the new crop, but they will remain tight. The price on galas continues to advance.

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



Asparagus

The production of asparagus has declined in Caborca and Sun Luis, Mexico, due to seasonality. Obregon, Mexico has had a low production start. Peru's production continues to increase. The markets are mostly stable.

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



Avocados

ALERT

60ct and 70ct triggers are in effect. The 48ct are also poised to escalate. As Cinco De Mayo pull comes into effect, markets are poised to rise again. Peru is just around the corner, with fruit expected to arrive in volume by late May or early June. The Peruvian fruit coming into the US will peak at 60/70ct, which is not normal. Since Mexican fruit has a higher dry matter content, ripening times remain short. Because of lower dry matter, California fruit is coming online in a light way.

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



Bell Peppers

Both coasts have steady supplies. A mix of new crop and old crop fruit is available. Coachella and Central FL are just getting started, while Sinaloa and Southern FL are winding down. Newer areas have better quality and command slightly higher FOBs. There are some deals to be had on colored bells at lower levels. We are now in full production in Canada.

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)

In Central Coast California, production has been light due to cool weather at the beginning of the season. Sporadic transfers of product from Central Mexico continue to boost supplies. Almost all production is being transferred to distribution centers.

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



Berries (Blueberries)

Organic quantities are beginning to increase in the Central Valley of California. Over the next few weeks, this should continue to be the case. The quality looks good. The conventional production will follow shortly (next week). Mid-May is the peak. Over the next few weeks, Georgia and Florida will reach their peak. Volume deals on pint blueberries are offered. Almost every day, light amounts of Central Mexican product cross into Texas.

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



Berries (Raspberries)

Due to high temperatures in Mexico, the availability of fruit for transfers has not changed much from the last few weeks. In mid-May, the numbers are expected to improve. The majority of production is being transferred to distribution centers.

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



Berries (Strawberries)

Production in Salinas/Watsonville and Santa Maria/Oxnard is on the rise. It will remain cool, but this will only benefit the quality and sizing of the fruit being harvested. As we move into the Mother's Day pull period in early May, forecasts predict mild cooler weather.

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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Driscoll's
Only the Finest Berries™



Commodity Updates



Broccoli

In Salinas and Santa Maria, broccoli supplies and quality are good this week. As we head into the weekend, we can expect the market to remain steady.

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



Brussel Sprouts

The supply of Brussels sprouts continues to be good this week. Through late April, you can expect promotable volume.

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. Now, Imperial Valley is 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



The cauliflower supply remains tight. Cooler weather slows growth, causing fields to lag behind. The market is expected to remain high into next week.

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



Celery

Despite a stronger market, supplies remain steady. Due to Yuma's completion, most production is coming from Oxnard/Santa Maria. Expect supplies to get lighter as we approach the Mother's day pull. Although large sizes continue to have a little better availability, most orders are being filled entirely. Most suppliers continue to provide quality products that are above average. The price of value-added items with this commodity may increase by the middle of the week.

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 main growing region is District 1. 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)

This week's markets are slightly higher. We are seeing a bit of a push due to Cinco de Mayo. On 230/250ct, fruit continues to peak. We will be entering Q3 of our lime contract next week.

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



Citrus (Oranges)

ALERT

Fruit is currently peaking on 72ct and larger; 88/113/138ct are extremely scarce and will remain that way throughout the navel season. Low fruit set and rain events will cause fruit to grow larger as the season progresses. As we navigate this shorter Navel season, please be flexible with size and grade. Lead time is very important; please send orders 5-7 days in advance. Brix are in the 12-14 range; quality is good. Zero gassing at this time.

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



Cucumber

Markets are steady. With moderate volumes, Nogales continues to chug throughout their season. East has moved to central Florida, and Georgia will start early May. By mid-May, Baja will be up and running.

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



Eggplant

Continually steady with adequate volumes on both coasts. Coachella and Plant City will be followed by new regions in about two weeks. The size of fruit coming out of MX is starting to come down with most of it being 24ct.

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)

Until the Chilean deal ends in early May, imports of grapes remain very tight. The east coast currently has a slightly easier market than the west. Mexico is expected to start in mid-May, according to shippers. A cautious optimism prevails that there will not be a gap like last year.

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



Grapes (Red)

Until the Chilean deal ends in early May, imports of grapes remain very tight. The east coast currently has a slightly easier market than the west. Mexico is expected to start in mid-May, according to shippers. A cautious optimism prevails that there will not be a gap like last year.

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



Green Onions

The supply of green onions this week continues to be tight. As a result of the previous weather, most shippers are experiencing mildew issues and lower yields. The market is expected to remain strong into next week.

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



Kale

Heading into the weekend, kale supplies and quality remain good.

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

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

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Commodity Updates



Lettuce Iceberg

ALERT

The main growing regions for this commodity are Salinas and Santa Maria. As with romaine and leaf lettuce, anthracnose has been an issue for lettuce growers in the Salinas Valley. Several shippers have had quality issues, and this will continue for a few more weeks. As of now, it is unclear how much damage has been caused by this pathogen and how far it has spread. Until now, Santa Maria has not faced the same growth problems as Salinas. Through April, value-added lettuce items will continue to be priced at a higher level.

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

Yuma and Huron are finished with production. Salinas and Santa Maria/Oxnard produce very little romaine. The availability of green and red leaves is moderate to light. The majority of production comes from the Salinas region. Many suppliers are experiencing quality issues caused by anthracnose, which has lowered yields throughout the valley. Overall, the quality is fair at best and will remain so throughout April. All leaf items and romaine hearts will have black and brown spotting as well as pink discoloration. It is likely that the escalation on value added romaine will continue throughout April.

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



Lettuce Tender Leaf

With arugula and spinach, most suppliers are playing catch-up. After the rain a couple weeks ago in Salinas, tender leaf items do not stand tall for harvest. The warmer weather this week should help us move forward. There will be some yellowing that will limit production, resulting in lower yields.

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



Melon (Cantaloupe)

As spring retail promotions have increased demand, vessel delays (primarily on the West) are moving loading schedules towards the end of the week. In Nogales, Mexican cantaloupes will be available by the end of the week, with growers monitoring quality levels. Brix levels offshore remain higher than those of Mexican fruit. The domestic fruit will be available the week of May 20.

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

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

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Commodity Updates



Melon (Honeydew)

The supply of honeydews has increased and the market is beginning to normalize. While Mexican honeydews (mainly 6/8s) are hitting the market, offshore melons are still peaking on larger sizes. By Mother's Day, domestic and offshore growers hope to improve supplies.

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



Melon (Watermelon)

With additional supplies from Nogales, the watermelon market has started to normalize. In Florida, there are limited watermelons available and there are restrictions on where they can be shipped. Florida watermelons will be harvested between 5/10 and 5/20. Florida's production was delayed by weather delays and lower yields.

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. The price of reds remains extreme, while that of yellows and whites has decreased.

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

The majority of shippers are in the final stages of packing on Bosc and expect to finish by the end of the month. Anjou's market is firm and slowly rising. Due to dwindling storage supplies and no other varieties to pack, this market will slowly advance. The new crop of California Bartletts will begin in mid-July, and they are in bloom right now.

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

Spot market availability from Oxnard and McAllen TX is limited, so suppliers are focusing on their contracts. Tropical weather has caused fruit to mature faster than normal, resulting in lower yields. The event is expected to last through Mother's Day. Affected pineapples are 6ct crowned and 7ct crownless. Pineapples of special varieties are in high demand.

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



Potatoes

Supplies of 70 - 120 CT Burbanks and Norkotahs are abundant. Stocks of 40 and 50 CT remain limited.

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

Out of MX, volume is a bit lighter. Georgia has started, but there will be no real volume until early May. California squash is available along with Sinaloa and Sonora in the west and Florida in the east. The quality is good in general.

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



Stone Fruit

Domestic tree fruit is only a few weeks away. Cherries and apricots will start around the end of April. It is followed by peaches in the first half of May, nectarines in the middle of May, and plums in late May. Peaches are being grown at the south end of the San Joaquin Valley, but the volume is small. In June, there will be a greater variety and volume of products.

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



Tomatoes

The round and roma markets remain elevated. The new crop of Romas has begun in Baja, while eastern Mexico will start next week. There is a mix of quality, with the best fruit coming from newer areas. However, sizing and volume are on the downside out of Sinaloa. The supply of rounds and blunts has just started in Central FL, but the quality is good to begin with. Cherry and grape tomatoes are also readily available.

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



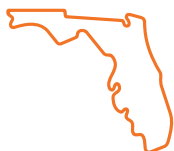
CALIFORNIA

Spotty drizzle and below average temperatures are likely due to deep marine layer conditions and gusty onshore winds. The morning lows will be in the upper 30s to low 50s while the daytime highs will be in the upper 50s to low 70s. A low passing nearby Friday will increase drizzle coverage and wind gusts up to 40 mph. Over the weekend, high pressure returns, clearing skies and returning temperatures to near average.



MEXICO

Through the weekend, we can expect mostly dry weather across the region a whole, except for a few light isolated showers over South-Central Mexico. The warm weather will continue through April 28. The high temperature will be in the mid 80s to mid 90s most days through Sunday. Wednesday morning lows are in the low 50s to low 60s, and Thursday through Sunday lows are in the mid 50s to mid 60s.



FLORIDA

Florida is expected to experience high pressure today. On Thursday, a cold front will stall north of the area. Later in the week, high pressure off the Atlantic coast pushes warmer temperatures over the state, but conditions remain dry. Tampa Bay and southeast Florida will occasionally experience gusts of 20 to 30 mph.



ARIZONA

With a cold front coming in from the north early Saturday morning, a low-pressure system continues to produce a cooling trend through Saturday. There will be no rainfall during this time period, but westerly winds will increase significantly beginning Wednesday evening. On Wednesday evening, expect gusts of 22-28mph, increasing to 30-35mph by Thursday afternoon. Friday afternoon, winds gust to 35-40 mph. It will be in the mid 80s to low 90s most valleys Wednesday, and then in the mid 70s to low 80s most valleys Thursday through Saturday. Starting Sunday, there will be some warming.

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

Freight Updates



Shipper delays in Salinas this week ease with warmer weather and supplies ramping up out west. California does have outlying growing regions still producing items like Berries which is creating extra miles between pickups and creating transit delays.



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

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

	04/08/24	04/15/24	04/22/24	Change from	
				week ago	year ago
U.S.	4.061	4.015	3.992	↓ -0.023	↓ -0.085
East Coast (PADD1)	4.118	4.068	4.047	↓ -0.021	↓ -0.104
New England (PADD1A)	4.305	4.311	4.326	↑ 0.015	↓ -0.196
Central Atlantic (PADD1B)	4.272	4.241	4.255	↑ 0.014	↓ -0.190
Lower Atlantic (PADD1C)	4.042	3.979	3.941	↓ -0.038	↓ -0.063
Midwest (PADD2)	4.011	3.965	3.935	↓ -0.030	↓ -0.049
Gulf Coast (PADD3)	3.760	3.710	3.707	↓ -0.003	↓ -0.116
Rocky Mountain (PADD4)	4.008	3.956	3.883	↓ -0.073	↓ -0.241
West Coast (PADD5)	4.723	4.702	4.661	↓ -0.041	↓ -0.031
West Coast less California	4.257	4.218	4.154	↓ -0.064	↓ -0.305
California	5.259	5.256	5.244	↓ -0.012	↑ 0.284

*prices include all taxes

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

Crop Update



With the transition complete, most of the row crop production will move to the coastal valleys (Oxnard, Santa Maria, Salinas) of California through the Fall. Spring weather patterns continue to challenge growers with the cool moist conditions. A series of cool low-pressure systems are forecast to continue the rollercoaster of temperatures typical of spring. These systems will bring a deep marine layer along with drizzle and gusty winds to the coastal valleys into early May. The cool, moist conditions provide ample opportunity for mold, mildew and disease pressure to thrive and enter the fields. Sclerotinia, bottom rot and mildew are impacting the iceberg production with some pockets of anthracnose also reported. Anthracnose is a soilborne pathogen favored by cool, wet periods and can survive for long periods in the soil. The pathogen spreads when rain or sprinkler droplets splash spores from infected plants onto surrounding fields carried by the winds. Cool temperatures are required for high spore production and the disease is primarily a problem in the early spring. Shippers are seeing this disease across the valley in current and upcoming acreage impacting production, especially in the romaine stands. Rough estimates indicate up to 20% of the romaine acreage in the Salinas Valley may be impacted by the fungus.

The cool temperatures will 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. Early 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 look to gain momentum. This may lead to some supply shortages in romaine and cauliflower moving forward.

These temperature variations can also lead to physiological changes in lettuce plants and disrupt the developmental process impacting quality and shelf life. Processed items will likely continue to see an increase in bruising, discoloration and breakdown showing up in the bag affecting quality and shelf life. Long-range forecasts continue to bring in cool systems through April with the possibility of a couple more wet systems in early May. This will not be beneficial to overall crop growth rates, quality and supplies.



Anthracnose on Romaine

TIM LYNCH
QUALITY ASSURANCE