

The Source

Commodity of the Month - Potatoes



MARKET ALERTS

Asparagus - Limited supply and quality is fair,

Blueberries - Limited supply and good quality.

Brussel Sprouts - Limited supply and quality is fair.

Grapes (Green) - Ample supply and quality is fair.

Grapes (Red) - Ample supply and quality is fair.

Green Onions - Limited supply and quality is fair.

SEPTEMBER 6, 2023

CROP UPDATES

Grape growers in the San Joaquin Valley are assessing the damage caused by Tropical Storm Hilary, which caused an average 40-50% crop loss. The industry estimates 35% of the remaining grape crop will be lost, with up to 25 million boxes lost. Harvesting workers will have to slow down to cull damaged fruit, and quality problems like scarring, split grapes, and mold are expected. Long-term, late-season varieties' crop size will be affected, leading to production ending ahead of normal schedules and a short storage window. [Read more](#)

WEATHER

Arizona - Wednesday afternoon highs will rise to the mid-90s to 102 degrees. Warming continues Thursday/Friday, 101-107 degrees. Most of the week, morning lows will be cooler than normal.17, and lows around 80 for most valleys.

California - In the morning, lows will be in the low-upper 50s, but by Thursday, they will drop into the upper 40s to mid-50s. Daytime highs will range from mid-70s to upper 80s early this week in Santa Clara Valley and the southern Salinas Valley.

Florida - temperatures will start to warm as highs range near to slightly above normal. Through the end of the week, rain chances will remain low. Rain is most likely near or south of I-4 and toward the end of the week.

Mexico - Through Friday, temperatures will remain seasonably warm. High temperatures in the mid-70s to mid-80s. It is expected that morning temperatures will drop into the low 50s to low 60s over most fields.

FREIGHT

New crops in Idaho and Washington are putting pressure on capacity from the Northwest. Fuel is active and diesel prices are elevated this week.

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2023 SUMMIT

October 9-11, 2023
Monterey Marriott

AT PEAK SEASON



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Commodities at a Glance



Commodity/Region Supply Price Quality



Apples

Yakima, Washington
(August-July)

Steady

\$\$\$

Good

Commodity/Region Supply Price Quality



Berries (Blackberries)

California
(Year Round)

Light

\$\$\$

Good



Asparagus

ALERT

Caborca
(Year Round)

Light

\$\$\$

Fair

Ciudad Obregon
(Year Round)

Light

\$\$\$

Poor

Peru
(Year Round)

Light

\$\$\$

Fair



Berries (Blueberries)

ALERT

California
(Year Round)

Light

\$\$\$

Good

Dover, Florida
(Year Round)

Light

\$\$\$

Good



Avocados

Mexico
(Year Round)

Light

\$\$\$

Good



Berries (Raspberries)

California
(Year Round)

Light

\$\$\$

Good

Dover, Florida
(Year Round)

Light

\$\$\$

Good



Bell Peppers

California
(May-October)

Steady

\$\$\$

Good

Ohio/NC/MI
(July-September)

Steady

\$\$\$

Good



Berries (Strawberries)

California
(Year Round)

Steady

\$\$\$

Fair

Dover, Florida
(Year Round)

Steady

\$\$\$

Fair

Commodities at a Glance



Commodity/Region Supply Price Quality



Broccoli

Mexico (Year Round)	Steady	\$\$\$	Poor
Salinas, California (May-October)	Steady	\$\$\$	Fair
Santa Maria, California (Year Round)	Steady	\$\$\$	Fair



Celery

Oxnard, California (Year Round)	Light	\$\$\$	Fair
Salinas, California (May-August)	Light	\$\$\$	Fair



Brussel Sprouts

ALERT

Mexico (December-August)	Light	\$\$\$	Fair
Oxnard, California (May-July)	Light	\$\$\$	Fair
Salinas, California (July-December)	Light	\$\$\$	Fair



Citrus (Lemons)

Oxnard/ Ventura County (February-September)	Light	\$\$\$	Fair
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Carrots

Various Northwest Regions (July-October)	Steady	\$\$\$	Good
Kern County, California (May-July) (October-February)	Steady	\$\$\$	Good



Citrus (Limes)

Veracruz (Year Round)	Steady	\$\$\$	Fair
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Cauliflower

Mexico (Year Round)	Steady	\$\$\$	Fair
Salinas, California (May-October)	Steady	\$\$\$	Fair
Santa Maria, California (Year Round)	Steady	\$\$\$	Fair



Citrus (Oranges)

California Desert/Yuma (April-November)	Steady	\$\$\$	Good
San Joaquin Valley (Year Round)	Steady	\$\$\$	Good

Commodities at a Glance



Commodity/Region Supply Price Quality



Cucumbers

Baja California (May-October)	Steady	\$\$\$	Good
Ohio/NC/MI (June-September)	Steady	\$\$\$	Good

Commodity/Region Supply Price Quality



Grapes (Red)

ALERT

San Joaquin Valley (June-December)	High	\$\$\$	Fair
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Eggplant

California (May-October)	Light	\$\$\$	Fair
Ohio/NC/MI/NJ (June-September)	Steady	\$\$\$	Good



Green Onions

ALERT

Canada (June-September)	Light	\$\$\$	Fair
Mexico (Year Round)	Light	\$\$\$	Good



Garlic

East Coast (Year Round)	Steady	\$\$\$	Good
Bakersfield, California (Year Round)	Steady	\$\$\$	Good
Gilroy, California (Year Round)	Steady	\$\$\$	Good



Kale

Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Salinas, California (May-October)	Steady	\$\$\$	Good



Grapes (Green)

ALERT

San Joaquin Valley (June-November)	High	\$\$\$	Fair
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Lettuce Iceberg

Mexico (Year Round)	High	\$\$\$	Good
Oxnard, California (March-June)	Steady	\$\$\$	Fair
Salinas, California (May-October)	Light	\$\$\$	Fair
Santa Maria, California (March-December)	Light	\$\$\$	Fair

Commodities at a Glance



Commodity/Region Supply Price Quality



Lettuce Leaf

Mexico (Year Round)	High	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Salinas, California (May-October)	Steady	\$\$\$	Good



Lettuce Tender Leaf

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



Melon (Cantaloupe)

Arizona (June-July) (October-November)	Steady	\$\$\$	Good
San Joaquin Valley (July-October)	Steady	\$\$\$	Excellent



Melon (Honeydew)

Arizona (June-July) (October-November)	Steady	\$\$\$	Excellent
San Joaquin Valley (July-October)	Steady	\$\$\$	Excellent



Melon (Watermelon)

San Joaquin Valley (July-October)	Steady	\$\$\$	Excellent
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Mushroom

Nationwide	High	\$\$\$	Excellent
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Onions

South Texas (July-April)	Light	\$\$\$	Fair
Tri-Cities, Washington (July-April)	High	\$\$\$	Fair
Eastern Oregon/Parma, ID (August-April)	High	\$\$\$	Good
San Joaquin Valley (May-August)	Light	\$\$\$	Fair
Hatch, New Mexico (July-April)	Light	\$\$\$	Fair



Pears

Sacramento Valley (July-September)	Steady	\$\$\$	Good
Hood River, Oregon (August-July)	Steady	\$\$\$	Good
Yakima, Washington (August-July)	Steady	\$\$\$	Good

Commodities at a Glance



Commodity/Region	Supply	Price	Quality
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Pineapples

Costa Rica (Year round)	Light	\$\$\$	Good
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Potatoes

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

California (May-October)	Light	\$\$\$	Good
Ohio/MI/OH/NJ (June-September)	Light	\$\$\$	Good



Stone Fruit

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

Baja California (Spring/Summer-November)	Light	\$\$\$	Fair
California (July-October)	Steady	\$\$\$	Good
Mexico (Year Round)	Steady	\$\$\$	Good
NC/TN/VA	Steady	\$\$\$	Good

Commodity Updates



Apples

Washington's 2023 harvest is picking up speed on Honey Crisp, Gala, and Ginger Golds. There is also a new crop of Gala available in California. The second week of September will mark the start of Fuji, Granny Smith, and Red Dels.

Asparagus

Asparagus continues to be limited in large sizes. The El Nino conditions have caused quality issues on larger sizes such as seeding and spreading. As Central Mexico continues to finish, Southern Baja, especially Constitucion, is already starting slowly and should pick up more as September progresses.

Peruvian asparagus supply is well below last year and we are now almost exclusively harvesting in the southern areas before the north returns in November. In the past, we have seen large volumes arriving in the south of Peru in late September to early October, but with the ongoing production issues related to El Nino weather patterns this year, we do not know if this will happen this year. Even with container arrivals this Friday, things remain limited. There are still plenty of concerns surrounding Peruvian asparagus production and what will occur when spring and summer warm temperatures return. It could lower yields even further and negatively affect quality.

Avocados

There has been an increase in 60Oct and larger sizes, but the market is easing up. This is due to customers ordering what they need and not over-purchasing. This causes MX to reduce their price and ship more across the states. The Flora Loca crop has about a month or so left before the Adventajada crop begins.

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Bell Peppers

Green supplies are steady in all regions with good availability. Due to past weather and current cooler temperatures, colored bells remain very snug; steady production out of Canada and California remains light.



Berries (Blackberries)

We will continue to see light supplies due to strong demand and low yields at the field level.



Berries (Blueberries)

As a result of a current production gap, this item will be in short supply. Michigan's season ended abruptly last week. The Pacific Northwest is declining steadily. Imports from Mexico, Peru, and Argentina are late coming online. For the next two to three weeks, we can expect limited availability.

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Berries (Raspberries)

In the next week or two, supplies are expected to lighten up. Baja production is all but finished. Central Mexico will begin to pick up slightly in late September. Production is expected to slow down on the West Coast due to a cooling trend.

Berries (Strawberries)

The market will firm up as growers begin to move past last week's heavy yields. Berry size is irregular and trending smaller. Quality issues related to bruising and mildew have been reported. The growers are struggling to keep problems out of the pack and the crews are going slower, resulting in a reduction in pack-outs.

Broccoli

This week, Santa Maria and Salinas continue to have a steady supply of broccoli, including florets. Mexico continues to struggle with yields due to erratic weather. Overall, the quality is good to fair. As we move into the weekend, this market is expected to remain steady.

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Brussel Sprouts

In the Brussels sprout market, demand continues to exceed supply. Due to erratic weather in Mexico, quality issues persist, resulting in tight supplies. It is expected that the market will remain high and steady as the weekend approaches. Low yields and smaller sizes have been reported in Salinas and Oxnard due to seeders and discoloration. Hoping Salinas supplies pick up slightly by the end of this week. Until then, supplies will remain tight.

Carrots

In the CA region, the market for conventional Jumbos is growing rapidly, but the lack of sizing across other growing areas has increased the market in the region.

Cauliflower

The cauliflower supply started to tighten last week. With the warmer weather bringing fields forward, cauliflower supplies have been good in recent weeks. In the fields set to harvest this week, the warmer weather has also caused a slight gap and quality issues.

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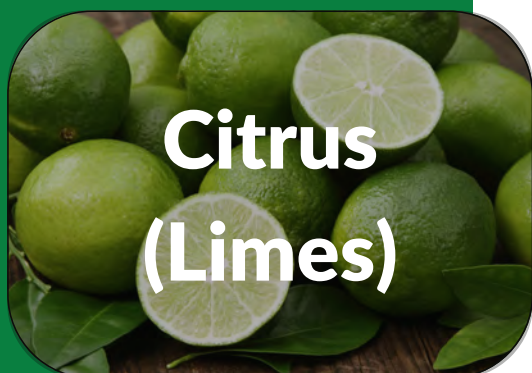
Celery

As the week begins, a few suppliers have smaller inventories. Thus, there will be enough product to meet demand for the week. Availability of smaller sizes is less than that of large sizes. Twenty-four counts remain strong. Supplies continue to be harvested in Santa Maria/Oxnard and Salinas. The quality remains strong. Expect very light production in Florida.



Citrus (Lemons)

District 2 is the main growing region and peaks on choice-grade fruit. Fruit is extremely tight across the board and looks to improve when District 3 gets going in the next couple of months. Offshore fruit is available on both coasts. Mexican product is available in a light way in South Texas.



Citrus (Limes)

Markets remain elevated. There has been an increase in the number of new crops, predominately of small sizes. The quality of large limes will improve, but it will be from the previous crop. With improved quality, we can expect better supply and lower markets by September.

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Citrus (Oranges)

Valencias are the main variety. The peak sizes range from 72ct to 88ct. As school demand picks up, small fruit markets are higher, especially 138ct. Offshore fruit is available on both coasts.

Cucumbers

Prices are steady at elevated levels. Production continues to be light out of Baja and on the east coast. This week is forecast to be warm, so cucumbers are starting to arrive out of the Carolinas.

Eggplant

California has a relatively short supply due to less acreage overall but also extremely hot weather has led to high prices. Relief could come in the form of Eastern eggs going West in mid-September but until then demand will exceed supply.

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Garlic

Throughout the week, California's production is expected to remain steady. Good quality has been reported.

Grapes (Green)

Unseasonable rains the week before last continue to affect the domestic deal with loss estimates ranging around 25 million cases. At this point, it is still unclear how this will affect the different varieties and what it will mean for late-season grapes. At the moment, greens seem to be less damaged than reds. In a couple of weeks, that will likely change.

Grapes (Red)

Unseasonable rain last week impacted the domestic deal with loss estimates for the state running around 25 million cases. It is unknown how this will affect late-season grapes and how it will affect different varieties. At the moment, greens appear to be less damaged than reds. As shippers lose volume and spend extra labor to clean up the pack in the fields, the red market continues to advance.

Commodity Updates



Green Onions

As a result of Hurricane Hilary's heavy rains and the recent extreme heat in Mexicali, green onions are in short supply and of poor quality. As supplies tighten, this market will rise. Supplies are expected to remain tight for the next three to four weeks.

Kale

The market continues to be steady. Throughout the week, availability is expected to be moderate to good. The market is stable and the quality is good.

Lettuce Iceberg

The market is steady to begin the week. Supply continues to be good in Salinas and southern California. Temperatures in the growing regions continue to accelerate the growth of this commodity, creating ample supplies to meet demand. There will be gaps in production towards the end of September. Weights average 38-43 pounds from most shippers. Occasionally, lighter weights have been reported.

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Lettuce Leaf

Due to warm temperatures and moderate demand, romaine, green, and red leaves are in good supply. Romaine hearts are also plentiful. Despite slight tip and fringe burn, the quality of the leaf items remains strong with good weights reported on all leaf items. Shippers are flexing this week for volume-type orders. Toward the end of the month, there will be gaps in production, such as lettuce.

Lettuce Tender Leaf

In recent weeks, the heat has reduced the shelf life of cilantro, curly parsley, and Italian parsley. Yellow/brown/black leaves may appear at receiving due to heat-related quality issues. As supplies tighten, especially cilantro, due to quality concerns, the market is expected to rise.

Melon (Cantaloupe)

Post-rain cantaloupe harvest is peaking on larger sizes. The fields are currently producing only a few 12s and very few 15s. The market is steady at higher prices.

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Melon (Honeydew)



Post-rain honey dew harvest is peaking on larger sizes. There are very few 6s and almost no 8s coming out of the fields at the moment. The market is slowly rising.

Melon (Watermelon)



California continues to harvest and has a good supply. The market is steady. There is a light volume available out of Nogales.

Mushroom



Supply is excellent and volume is promotable.

Commodity Updates



Onions

There is an increase in Northwest onion supplies. Harvesting continues. Prices are stable.

Pears

This week, most shippers are packing Bartletts in Washington. Packing has begun in the mountain district for California pear shippers. Currently, Bartletts, Bosc, and Red pears are being shipped.

Pineapples

As rains continue in the tropics, volume is extremely tight. Throughout August and into September, volume will be severely tight.

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Potatoes

As harvesting continues, the market continues to decline. Due to the high quality of the product being packed, #2s are more limited.

Squash

Yellow squash prices are higher as they are more sensitive to weather. Recent weather in both the east and west has lightened supply. As Baja recovers from the tropical storm, western demand relies primarily on Santa Maria. Despite heavy rain, the east coast has begun its transition south to the Carolinas. It was supposed to start in Georgia last week, but heavy rains delayed it as well. Nogales should start on squash in late September.

Stone Fruit

The demand for peaches continues to exceed the supply. The supply of nectarines is better than that of peaches, but they remain tight. Plums are starting to tighten up, and the market is rising. With some shippers, pluots are beginning to wind down. The season for Asian pears has begun and will last until December.

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Commodity Updates



Tomatoes

As a result of weather-affected crops out of Baja, volumes and quality have rebounded. Supplies in CA and TN/NC are steady. Grape tomato supplies continue to be tight with light supplies on both coasts. We anticipate a possible gap in late October as Quincy and GA were heavily impacted by Hurricane Idalia.

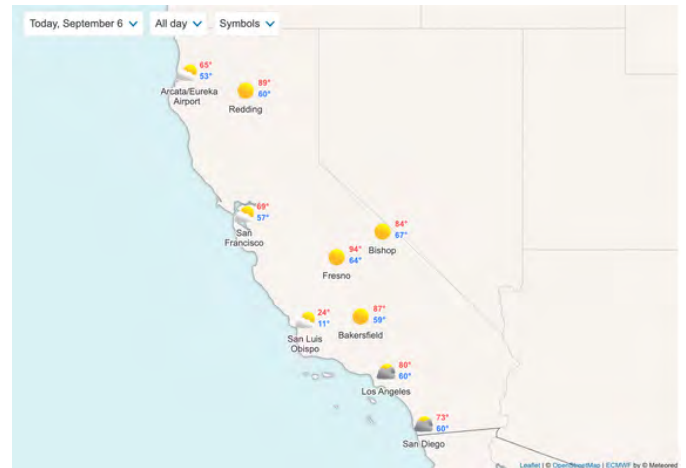
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Weather Updates



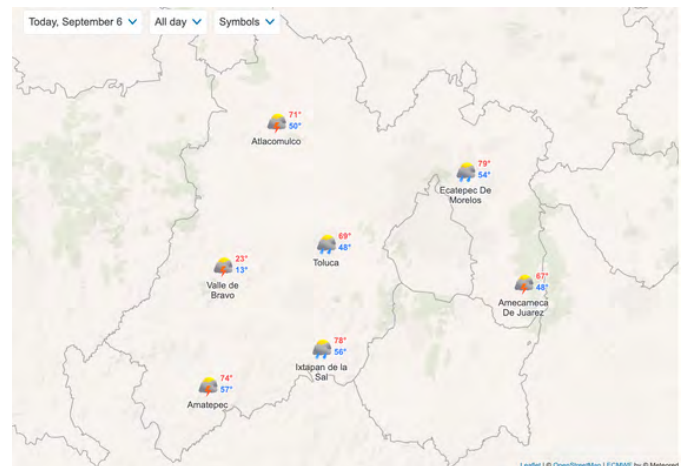
CALIFORNIA

On Monday, high-pressure returns to the area, lowering the marine layer and starting a warming trend. In the morning, lows will be in the low-upper 50s, but by Thursday, they will drop into the upper 40s to mid-50s. In Santa Clara Valley and the southern Salinas Valley, daytime highs will range from mid-70s to upper 80s early this week. Santa Clara Valley's maximum temps will be in the mid-60s to low 70s by Thursday, while southern Salinas Valley's will reach the upper 70s to mid-90s.



MEXICO

Over the next five days, shower activity will remain isolated. Most showers will produce rain totals between 0.02" and 0.20", but some t-storms may produce higher amounts. Through Friday, temperatures will remain seasonably warm. High temperatures in the mid-70s to mid-80s. It is expected that morning temperatures will drop into the low 50s to low 60s over most fields.



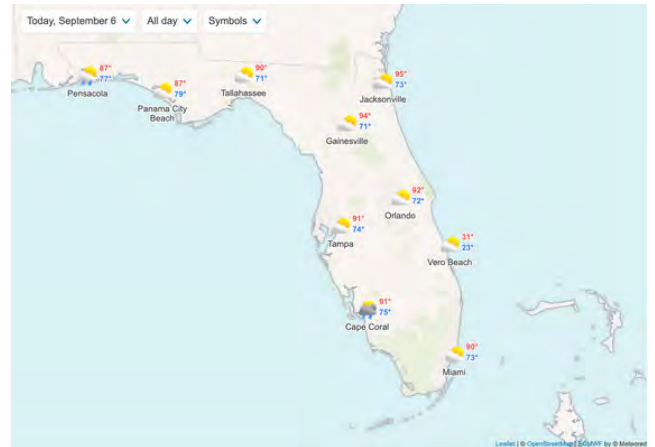
For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

Weather Updates



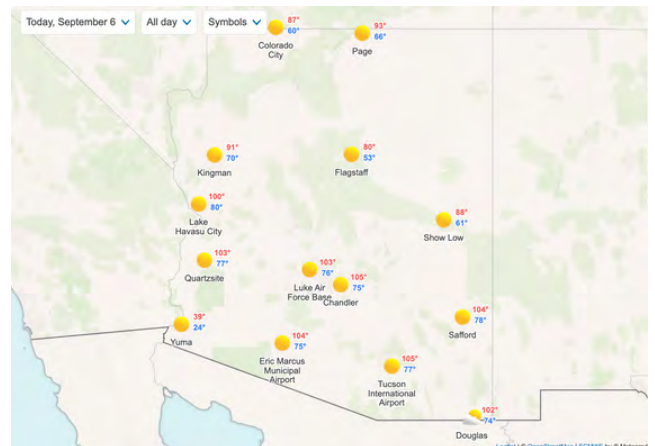
FLORIDA

To start the week, most of Florida will see cooler mornings and near-normal temperatures. This is due to dry air over the region. In the later part of the week, temperatures will start to warm as highs range near to slightly above normal. Through the end of the week, rain chances will remain low. Rain is most likely near or south of I-4 and toward the end of the week.



ARIZONA

Yuma area valleys experienced heavy rainfall and flash flooding Friday night and Saturday morning. The high-pressure ridge rebuilds and strengthens this week, bringing drier conditions and warmer temperatures. Wednesday afternoon highs will rise to the mid-90s to 102 degrees. Warming continues Thursday/Friday, 101-107 degrees. Most of the week, morning lows will be cooler than normal.



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

Freight Updates



New crops in Idaho and Washington are putting pressure on capacity from the Northwest. Fuel is active and diesel prices are elevated this week.



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

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

	08/21/23	08/28/23	09/04/23	Change from	
				week ago	year ago
U.S.	4.389	4.475	4.492	↑ 0.017	↓ -0.592
East Coast (PADD1)	4.422	4.475	4.474	↓ -0.001	↓ -0.559
New England (PADD1A)	4.414	4.433	4.467	↑ 0.034	↓ -0.694
Central Atlantic (PADD1B)	4.553	4.616	4.625	↑ 0.009	↓ -0.598
Lower Atlantic (PADD1C)	4.374	4.429	4.419	↓ -0.010	↓ -0.531
Midwest (PADD2)	4.302	4.385	4.383	↓ -0.002	↓ -0.749
Gulf Coast (PADD3)	4.095	4.169	4.171	↑ 0.002	↓ -0.625
Rocky Mountain (PADD4)	4.500	4.658	4.727	↑ 0.069	↓ -0.244
West Coast (PADD5)	5.140	5.302	5.390	↑ 0.088	↓ -0.303
West Coast less California	4.794	4.973	5.028	↑ 0.055	↓ -0.247
California	5.535	5.678	5.801	↑ 0.123	↓ -0.373

*prices include all taxes

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

Crop Insights



Grape growers continue assessing the damage from Tropical Storm Hilary that brought winds and heavy rains to the San Joaquin Valley in late August. This storm hit the region during peak harvest with approximately 70% of the crop still on the vine. Many growers are seeing an average of 40-50% crop loss as a result of the storm. Overall, industry estimates project 35% of the remaining grape crop, and up to 25 million boxes will be lost. Making this year's crop the lightest on record since the mid-1990s. These estimated losses could increase depending on how late-season varieties react as they mature.



As growers harvest from the storm-impacted vineyards, workers will have to drastically slow down harvesting in order to cull damaged fruit from the vines. Reports indicate large concentrations of the mid-season varieties that were close to harvest were lost as assessments continued for the later-season varieties. Quality problems such as scarring, split grapes, and mold will likely be on the rise and an overall shorter shelf life is to be expected. Compactness, plumpness, or fullness of the bunch along with bunch size will also likely be impacted as harvests continue.



In a long-term perspective, the overall crop size for late-season varieties has been affected. While assessments continue, lesser yields will likely bring an end to production ahead of normal schedules. Also, the "storage window" for holding the grapes for late-season supplies will also be cut short, likely meaning an early end to the California season. This may lead to a gap in supplies before offshore supplies become available in December. Growers will continue to assess damage and we will keep you up to date as we gather more information.



TIM LYNCH
QUALITY ASSURANCE