

The Source

Commodity of the Month - Carrots



MARKET ALERTS

Asparagus - Asparagus production from Mexico decreases, with active markets until Peru increases volume in late April.

Avocado - Higher elevation growers delay harvests to increase prices, resulting in shorter ripening times due to higher dry matter.

Blackberries - Shippers expect shortages until May, with Central California increasing production. Limited supplies from CMEX and Baja.

Blueberries - Rain and logistics affect Baja and Central Mexico, while Peru faces quality issues associated with weather, with limited supplies in McAllen, TX.

Raspberries - CMEX and Baja supplies limited; labor shortage diminishing post-Easter; Central California production rising in May.

Strawberries - Salinas and Watsonville begin light harvesting; North expects increased supply; Dover, FL season ends because of quality issues.

Broccoli - Supplies tight due to lower yields and rains in Salinas Valley; market expected to rise approaching weekend.

Brussel Sprouts - Sprout supply is unstable due to Easter disruptions; prices spike, supplies increase mid-April.

Lemons - Sizes smaller than 140ct are extremely tight, mostly from District 1.

APRIL 3, 2024

CROP UPDATES

A cold low-pressure system is expected to bring the coldest temperatures of the year to California, with light to moderate rain and possible freeze and frost conditions in Salinas and Santa Maria valleys. Strong winds of 20-35mph are also expected. [Read more](#)

WEATHER

Arizona - High pressure ridges will cause rapid warming, leading to unusual late-winter storms. Borrego Springs may experience light rain, while central Arizona may experience 10-15 degrees below normal temperatures.

California - Mid-week high pressure will persist, with morning lows in the 30s-50s and day highs in the 60s-70s. Glides up to 30 mph on Wednesday, bringing light to moderate rain.

Florida - On Wednesday, showers and thunderstorms are expected in Northern and South-Central Florida, with rainfall ranging from 0.60" to 1.20" in Northern to Central Florida, and light showers in Southern Florida.

Mexico - Central Mexico is expected to experience warm daytime temperatures for five days, with mostly dry conditions through April 7th. Maximum temperatures will be in the low 80s to 90s.

FREIGHT

Northern California growing regions began shipping this week, which overlaps with Yuma, AZ production. In the coming weeks, load both regions.



MARKET ALERTS

Oranges - Larger sizes are scarce due to low fruit set.

Garlic - A tight market is expected despite recent good harvests in South America.

Red/Green Grapes - Due to irregular vessel arrivals, prices remain high until mid-May.

Green Onions - This week, green onions were less available due to mildew issues.

Watermelon - Due to weather delays, limited Florida watermelons are available due to oversupply.

Onions - In Eastern Oregon/Parma, Idaho, yellows are better supplied than reds; South Texas prices are high.

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Commodity Updates



Apples

There is a good supply of most apple varieties. Gala's being the one exception. This year's crop was at near record levels and shippers pushed promotions and sales heavily in the fall. Due to that effort, spring supplies were lighter than usual, and the supply between now and the next crop will be skinny.

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



Asparagus

ALERT

This time of year, asparagus production out of Mexico continues to decline. Until Peru increases volume during the third or fourth week of April, markets will be extremely active.

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



Avocados

ALERT

The market is increasing as higher elevation growers have the majority of fruit right now, which means they are holding off on harvesting and crossings to increase prices. Ripening times are short due to higher dry matter. We should see the market stabilize in the next couple of weeks.

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



Bell Peppers

Both coasts are experiencing fairly steady markets. There are some issues with older crops due to rain, but quality is good. Supplies from Sinaloa are adequate. Sonora crops will get started in a few weeks. Coachella will follow later this month.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

ALERT

Supplies are very light coming out of CMEX and Baja on transfer trucks. Slowly, the labor shortage experienced during the Easter season is improving. Through the end of the month, shippers are expected to be short. In May, Central California is expected to produce more meaningful numbers.

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



Berries (Blueberries)

ALERT

Central Mexico, Baja, and Peru are beginning to provide more supplies. Offshore containers are being held up at ports. Harvesting has been disrupted by rain in Baja, while Central Mexico is experiencing high temperatures and logistical difficulties. As a result of weather-related quality issues, container offloads from Peru are becoming less regular. There are still small quantities available in McAllen, TX.

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



Berries (Raspberries)

ALERT

There is a lack of supplies coming out of CMEX and Baja on transfer trucks. Slowly, the labor shortage experienced during the Easter season is improving. Through the end of the month, shippers are expected to be short. In May, Central California is expected to produce more meaningful numbers.

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



Berries (Strawberries)

ALERT

Oxnard and Santa Maria have experienced consecutive rain events over the past month. Shippers have been stripping fruit each week at the end of the week, reducing total yields. Another rain front is expected on Thursday and Friday. Salinas and Watsonville have begun harvesting very lightly. Weather permitting, numbers from the North should slowly increase over the next few weeks. We are currently in a demand-exceeds-supply situation. The season is finished in Dover, FL due to quality issues.

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

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

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Commodity Updates



Broccoli

ALERT

As a result of lower yields and rains affecting the Salinas Valley harvest, broccoli supplies remain tight. As the weekend approaches, expect this market to rise.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Santa Maria, California (Year Round)	Light	\$\$\$	Fair
Yuma, Arizona (November-May)	Light	\$\$\$	Fair



Brussel Sprouts

ALERT

For at least the first part of the week, sprout supply will remain slightly unstable. Labor and border crossing schedules for the Easter holiday are causing a short-term disruption in supply. However, by the end of the week, things should be back to normal. In the coming week, open market pricing will spike. By mid-April, supplies should pick up.

Commodity/Region	Supply	Price	Quality
Mexico (December-August)	Light	\$\$\$	Fair



Carrots

Whole carrots are doing well on the market. The Imperial Valley is now the main region for growth. Size looks good. No issues for the foreseeable future.

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



Cauliflower

Cauliflower supplies have remained consistent this week. Look for this market to remain steady as we approach the weekend.

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



Celery

The market is steady and this is likely to continue throughout the week. All sizes are available out of Oxnard/Santa Maria. If loading in Salinas, shippers are charging a fee to transfer from down south so please be aware. Yuma's production is complete with all shippers, but product will be transferred from down south throughout the week. Overall the quality continues to be above average.

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

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

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Commodity Updates



Citrus (Lemons)

ALERT

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)

The markets are slightly lower. The demand is a bit flat after the holiday. Veracruz's quality is generally good. Expect sizing to become more limited on large fruit. Offshore fruit is available.

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



Citrus (Oranges)

ALERT

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

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



Cucumber

Prices are steady or slightly lower. As FL growers begin planting their crops, volume should improve as April progresses. GA will begin in the first week of May. Sinaloa and Sonora overlap in the west, contributing to more supply. Overall quality is good.

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



Eggplant

Volume is steady at moderate levels. FL production will be light until Central region gets started in April. The Mexican production is steady and of good quality.

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

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

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Commodity Updates



Garlic

ALERT

Overall, garlic supplies remain tight. In recent months, there has been a good harvest of Argentinian garlic in South America. However, this will not fill the overall supply gap. The garlic market will become tighter and more volatile over the next few months.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Light	\$\$\$	Good
Bakersfield, California (Year Round)	Light	\$\$\$	Good
Gilroy, California (Year Round)	Light	\$\$\$	Good



Grapes (Green)

ALERT

The demand for imported grapes remains higher than the supply. A lack of consistency in vessel arrivals prevents a smooth flow of incoming product and keeps the market active. In spite of brief periods of shortages, adequate supplies, an empty pipeline and pre-committed program volumes will keep the market price high. Expectations are this will continue until the Mexican grape deal starts in mid-May.

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



Grapes (Red)

ALERT

The demand for imported grapes remains higher than the supply. A lack of consistency in vessel arrivals prevents a smooth flow of incoming product and keeps the market active. In spite of brief periods of shortages, adequate supplies, an empty pipeline and pre-committed program volumes will keep the market price high. Expectations are this will continue until the Mexican grape deal starts in mid-May.

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



Green Onions

ALERT

There are fewer green onions available this week. Due to previous weather, most shippers are experiencing mildew issues and lower yields. Next week, this market is expected to remain strong.

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



Kale

As we head into the weekend, kale supplies and quality are 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

Most shippers continue to produce light to moderate quantities as the Yuma season winds down. Currently, this commodity is being harvested in Yuma, Huron, and Salinas. All three regions reported clean quality with weights ranging from 36 to 41 pounds. There have been reports of slight discoloration and misshapen heads, but only in a mild way. Later this week, escalation on value-added items will be removed from the second tier.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (March-December)	Steady	\$\$\$	Good
Yuma, Arizona (November-May)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Good
Huron, Arizona (Seasonal)	Steady	\$\$\$	Good



Lettuce Leaf

It is true that romaine is getting softer, as well as green and red leaves, but supplies remain moderate at best. Since the past few weeks, production has increased both north and south of the country. By the end of the week, we expect to be down to the first tier of escalation on romaine items. With multiple shippers on all leaf items, the quality has been better than in past weeks.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Huron, Arizona (Seasonal)	Steady	\$\$\$	Good
Salinas, California (May - October)	Light	\$\$\$	Good
Yuma, Arizona (November-May)	Light	\$\$\$	Good



Lettuce Tender Leaf

As Yuma season comes to an end, spinach supplies are looking really good. Aphids are causing problems for some spinach growers. Arugula will be tighter as we transition. In the case of yellowing, production will be limited, resulting in lower yields.

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



Melon (Cantaloupe)

There has been an increase in demand due to spring retail promotions, and vessel delays are causing loading schedules to be moved to the end of the week. Yuma growers are waiting for their plants to bloom before planting them in the ground. There is a peak on 9s and 12s. The quality of the fruit remains solid and minimal scarring remains.

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

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

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Commodity Updates



Melon (Honeydew)

There is a tight market for honeydews. As a result of vessel delays and lower yields in Mexican fields, demand has increased.

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

Central America (December - May)	Light	\$\$\$	Good
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Melon (Watermelon)

ALERT

While there has been some relief in the Watermelon Market, demand still exceeds supply. Only a limited amount of watermelons are available from Florida, but there are restrictions on where they can go. Production was delayed in Florida due to weather delays.

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

Central America (December-May)	Light	\$\$\$	Fair
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Mushroom

Supply and availability are excellent.

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



Onions

ALERT

The California desert is expected to begin shipping on April 22nd. Yellows are in better supply than reds in Eastern Oregon/Parma, Idaho. South Texas supplies are improving, but prices remain high. Supplies are limited until April.

Commodity/Region	Supply	Price	Quality
South Texas (July-April)	Light	\$\$\$	Good

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

Anjou prices have risen rapidly and will remain tight until mid-July when new crop Bartletts arrive in California. There will be a shortage of 110s and smaller. Small Bosc remain readily available.

Commodity/Region	Supply	Price	Quality
Hood River, Oregon (August-July)	Light	\$\$\$	Good

Yakima, Washington (August-July)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Pineapples

Growers are meeting their contracted orders. Tropical weather has caused fruit to mature faster than usual. 6ct crowned and 7ct crownless pineapples have been impacted. A shift in loading schedules has been caused by vessel and USDA delays. Pineapples of special varieties are in high demand.

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



Potatoes

The number of 40 - 60 CT cartons is limited for both Norkotahs and Burbanks. Storage continues to peak at 90 CT.

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

Both coasts have strong supplies. Even after the recent rains in FL, there are still plenty of supplies to go around as more growers in the central region start up. There is plenty of supply crossing through Nogales in Mexico. Overall quality is good with some shippers dealing with load volume.

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



Stone Fruit

There is a limited supply of domestic Kiwi. As the volume of shippable domestic fruit declines, the market is starting to react. Domestic fruit is repackaged to order by most shippers. The domestic crop is supplemented by imported Kiwi from Greece and Italy. Peaches, plums, and nectarines are arriving in small quantities on both coasts. Peach supplies are very light.

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



Tomatoes

Demand exceeds on rounds and romas. It has been raining in FL last week, resulting in a decrease in both quality and production. Mexico's crops are at lighter levels as the Sinaloa region winds down. In a few weeks, there will be new production from northern areas. Baja will begin in May. Nogales will run through early June.

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

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

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FRESH LINK



Weather Updates



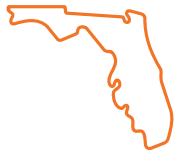
CALIFORNIA

Through mid-week, high pressure will remain over the area. Lows in the morning will be in the upper 30s to low 50s, with highs in the mid 60s to upper 70s during the day. There will be gusts up to 30 mph Wednesday ahead of the next system, which will bring light to moderate rain starting Thursday. Rain chances continue through Saturday morning with totals between 1/4" and 3/4".



MEXICO

The region of Central Mexico will experience warm daytime temperatures for the next five days. The chances of rain are not zero, but overall a mostly dry period through Apr 7. The maximum temperatures will be in the low 80s to low 90s through Friday and the mid 80s to low 90s over the weekend. The low temperatures should cool down to the upper 40s to upper 50s over most fields by Sunday morning.



FLORIDA

Over most of Northern and South-Central Florida, showers and thunderstorms are expected on Wednesday. There will be a range of rainfall totals from 0.60" to 1.20" over Northern Florida to Central Florida, 0.15" to 0.35" over South-Central Florida, and 0.02" to 0.20" over Southern Florida. In Southern Florida, a few light showers are possible on Thursday, but drier weather is expected through the weekend in most areas.



ARIZONA

A fast-building ridge of high pressure will cause rapid warming Wednesday-Thursday, ahead of the next highly unusual late-winter storm on Friday. Borrego Springs could see light rain Friday afternoon, and central Arizona Friday evening and overnight. This weekend, temperatures will be 10-15 degrees below normal due to a cold air mass. On Wednesday-Thursday, morning lows will be in the mid 40s-mid 50s, cooling to the upper 30s-mid 40s Saturday and Sunday, with brief frost possible in Wenden.

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

Freight Updates



Northern California growing regions have started shipping this week which overlaps with existing production in Yuma, AZ. Be prepared to load both regions in the coming weeks. We are happy to help find a freight solution for you today!



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

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

	03/18/24	03/25/24	04/01/24	Change from	
				week ago	year ago
U.S.	4.028	4.034	3.996	▼ -0.038	▼ -0.109
East Coast (PADD1)	4.127	4.125	4.083	▼ -0.042	▼ -0.143
New England (PADD1A)	4.300	4.321	4.305	▼ -0.016	▼ -0.275
Central Atlantic (PADD1B)	4.301	4.294	4.271	▼ -0.023	▼ -0.256
Lower Atlantic (PADD1C)	4.046	4.042	3.990	▼ -0.052	▼ -0.088
Midwest (PADD2)	3.955	3.986	3.949	▼ -0.037	▼ -0.003
Gulf Coast (PADD3)	3.745	3.717	3.670	▼ -0.047	▼ -0.217
Rocky Mountain (PADD4)	3.968	3.986	3.949	▼ -0.037	▼ -0.201
West Coast (PADD5)	4.639	4.666	4.651	▼ -0.015	▼ -0.073
West Coast less California	4.148	4.173	4.147	▼ -0.026	▼ -0.295
California	5.203	5.224	5.221	▼ -0.003	▲ 0.174

*prices include all taxes

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

Crop Update



A very cold low-pressure system moves into California Thursday with light to moderate rain expected across the state. In fact, forecasts expect this system to bring the coldest temperatures of the year to California. The cold system will bring possible freeze and frost conditions to the inland valleys of Salinas and Santa Maria. Overall precipitation is forecast to be between ¼” - ¾” into Saturday. This system will also bring very strong winds of 20-35mph to California and the Southwestern Desert regions. Another weak system moves in on Sunday with a slight chance of rain, keeping the cold temperatures around the region into early next week.

The timing of these systems will not help growers as they continue the transition from the desert regions to the coastal valleys (Oxnard, Santa Maria, Salinas) of California. Crops in these coastal valleys have seen substantial rain and cool temperatures throughout the growth cycle impacting growth rates and grower activities/field work in these coastal valley regions. Early production is showing generally good quality with smaller head sizes and density contributing to lighter carton weights. Strawberry supplies from Southern California will once again receive a shot of rain and very strong winds impacting production in the near term.



As growers in the Southwest Desert region wrap up production over the next couple weeks, recent rains have increased mildew problems in the remaining leafy green stands. This may impact yields as growers attempt to stretch remaining acreage in the region. This latest system is forecast to bring very strong winds and a slight chance of showers across the low deserts into Monday. This will increase dehydration in the leafy green fields contributing to lesser texture and shelf life. Insect pressure continues to be a problem in these late fields. These late season supplies will continue to show some premature pinking along the ribs that is not seen during harvest and tends to show up during storage. Processed items will likely see an increase in bruising, discoloration and breakdown showing up in the bag affecting quality and shelf life. It remains very important to keep your rotations in check as the overall quality and shelf life of most crops, especially processed items, will be challenged.



At this point we will have to wait and see how the cold temperatures, winds and rain impact the numerous growing regions in production with upcoming weather patterns crucial to supplies and quality.

TIM LYNCH
QUALITY ASSURANCE