

The Source

May 24, 2023

PRO*ACT

Market Updates

Apples –Granny Smiths continue to be in short supply. With the storage season nearing an end, Washington shippers are stepping up Gala packing. Small reds, Golds, and Fujis are also in good supply.

Asparagus –A lack of supplies coming out of Mexico is being eased by good domestic supplies from Washington and Michigan. Mexico's supplies should start picking up in the first week of June. Peru continues to produce only limited quantities from the south, mostly in Ica. However, we expect the large growing areas to begin in late June or early July. With overlapping production from Mexico, Canada, Peru, and the United States, supplies will be good come June.

Avocados –It is a lower market across the board on all sizes. Within the next month or so, normal crop will end. Next is the Flora Loca crop. As of yet, we do not know what the peak sizes will be for that crop.

Bell Peppers –We should have steady supplies from both coasts, with Florida and Nogales wrapping up over the next two weeks. California Desert is at peak production and Georgia is ramping up supply. Red bells will start out of the desert towards the end of the month as some Nogales shippers will continue into late June, weather permitting.

Berries (Blackberries) –This item is in very moderate demand. We expect the California crop to begin production in approximately two weeks, weather permitting. There have been occasional transfer delays coming out of Baja and Central Mexico.

Berries (Blueberries) –Georgia is gapping due to weather and Florida has finished for the season. Central Mexico is still producing very few numbers. As soon as next week, the Central California crop will begin in a light way.

Berries (Raspberries) –This item continues to be very tight. In California, winter weather has reduced plantings and pushed start dates forward. Mexico continues to cross light numbers into the U.S.

Continued

Berries (Strawberries) –At the moment, there are plenty of strawberries available in Santa Maria, Salinas, and Watsonville. Run offers through us where volume deals are being offered.

Broccoli –Salinas and Santa Maria continue to have good supplies of broccoli, including florets. Overall, the quality is above average. Going into the weekend, expect this market to stay steady with good supplies and quality.

Brussels Sprouts –Brussels sprouts are in very limited supply. Oxnard usually begins at the beginning of May, but it has been pushed back a couple weeks. As the weekend approaches, the market is expected to increase. Overall, seeders are being reported and it is causing lower yields and smaller sizing.

Carrots –Whole carrot supplies are in a better position. There is a slight decline in the markets. Imperial Valley growing region will go until mid/late May. Bakersfield's growing region is next up with no issues forecasted on sizing.

Cauliflower –We are seeing good supplies of cauliflower in Salinas and Santa Maria. We see no supply issues going into the weekend as this market has come off.

Celery –As expected, there will be very limited availability of this commodity throughout the week. Third-tier escalation is in effect for value-added products. It is anticipated that the southern California region will provide some relief in two to three weeks, but for now, there will be light availability on all sizes. Seeder has been an issue as well. Salinas is expected to begin production at the end of June.

Citrus (Lemons) – District 1 is the main growing region for FCY fruit. District 2 will have more choice-grade fruit as it ramps up. Small fruit is tight due to the rain helping to increase fruit size. The market continues to rise.

Citrus (Limes) –The markets are fairly steady, and supply and quality have both improved. The smaller fruit bottomed out while the larger fruit is fairly tight. The market is expected to settle in the coming weeks.

Continued

Citrus (Oranges) –There is a peak in supplies for 72/88ct. The quality is good. The market for small fruit with significantly less volume is firming up. To help with the shortage of 113/138ct navels, Valencias have begun very lightly.

Cucumbers –There is a steady supply, good quality and volume on both coasts.

Eggplant –On both coasts, supply is steady, volume and quality are good. Eggplants are finishing up in Nogales.

Garlic –Throughout the week, California's production is expected to remain steady. It has been reported that the quality is good.

Grapes (Green) –New crop green seedless will be available in Nogales this week. Demand still exceeds supply and the market is in the high \$40s to low \$50s.

Grapes (Red) – Next week, there will be a new crop of red seedless in Nogales. Demand will exceed supplies until mid-June.

Green Onions –This week, Mexican-grown supplies continue to improve. In Mexico, the warmer weather has helped spur growth. The quality is good overall.

Kale –The market continues to be steady. The availability is expected to be moderate to good throughout the week. In general, the quality of the product is good, and the market is stable.

Lettuce (Iceberg) –The supply of this commodity is expected to be strong throughout the week in Salinas and southern California. Suppliers are flexing on large quantity orders so promote as much as possible. Average weights range between forty-two and forty-five pounds, with the majority coming from the Salinas Valley. A few misshapen heads have been reported, but otherwise, the quality is good. You can also expect better quality on value-added products.

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Lettuce Leaf – The Salinas Valley's ideal weather conditions have led to an abundance of romaine and other leafy items. Several shippers are flexing, so promote as much as possible throughout the week. The average weight of romaine is thirty-four to thirty-seven pounds, while the weight of red and green leaf averages twenty-two to twenty-four pounds. There is very little to no fringe or tip burn to report. There will be good availability of romaine hearts as well.

Lettuce Tender Leaf – Italian parsley continues to be the one tender leaf item that's limited. The product in Salinas is still behind schedule due to the heavy rains we had when the growers were trying to plant the product. We hope that the Salinas Valley weather will warm up over the next week and the growth will improve.

Melons (Cantaloupe) – The Nogales Cantaloupe season has begun. The desert deal begins this week. The market is up and supplies are tight. Florida offshore is done.

Melons (Honeydew) – Honeydew's market is mostly steady. 5/6's are in short supply. The quality overall is good. Honeydews have started in Nogales. The Yuma and Imperial Valley will begin next week. Offshore out of Florida is done.

Melons (Watermelon) – The offshore fruit is done. There are steady supplies coming out of Mexico. Florida is also shipping.

Mushrooms – There is an excellent supply and availability.

Onions – There is a shortage of supplies. The main growing region is the California Desert. After Memorial Day, New Mexico and California's San Joaquin Valley will start.

Pears – The market is slightly higher. It is expected that prices will gradually rise from May to July as storage supplies run out. The new crop of California Bartlett's is projected to start the week of July 10th, but weather conditions could delay it.

Continued

Pineapples – There is a light open market volume. The quality of the product is good, and the market is steady.

Potatoes – Burbanks are the main variety being shipped. There will be mixed manifests until Norkotah supplies run out. The market remains extreme.

Squash – There is a strong supply on both coasts. Next week, North Carolina will start followed by New Jersey, promotable volume is available. As California squash begins in the Central Valley, Santa Maria and Baja looking to start early in June, Nogales is winding down quickly.

Stone Fruit – California has begun producing peaches, nectarines, and apricots. As a result of the cooler weather, cherry production has been delayed, but should pick up in volume by the end of the week.

Tomatoes – As we are in transition, markets are elevated. There is less fruit coming out of Mexico overall. The new regions of Baja and Eastern Mexico will be in better production by June. California is expected to begin in the first week of July. Out east, the Ruskin/Palmetto areas will go through May then move to Quincy followed by Georgia and the Carolinas.

A Peek at Peak Seasons

Strawberries **Blackberries (Past Peak Season)**
Blueberries (Past Peak Season)
Raspberries (Past Peak Season)

Freight

Trucks remain steady in California, Idaho, and the Northwest. The national diesel average is also steady at 3.883 while California's diesel price is at 4.825 per gallon.

Weather

California – Through Friday, an upper low is slowly passing to the north, causing deep marine layer cloudiness, below-average temperatures, and a chance of spotty drizzle. Coastal lows will be in the low 40s to low 50s in the morning, with daytime highs in the upper 50s to upper 70s inland. As the low moves off Friday, Saturday's maximum temperatures should reach the low 80s.

Mexico – Throughout the region, isolated showers and thunderstorms are possible into the weekend. Rain totals should range from trace amounts up to 0.20" in most showers, with higher totals possible in some thunderstorms. Through Saturday, temperatures will be near to slightly below normal. Most of the region will have high temperatures in the mid-70s to mid-80s through May 27. Through Saturday morning, lows will be in the low 50s to near 60 degrees.

Florida – Throughout the week, a weak frontal boundary stalls over Florida, producing widespread showers and thunderstorms. Rain totals should be higher inland than coastal, with over 1 inch per day possible for most locations through Friday. Due to the increased cloudiness, afternoon highs will run cooler than usual, mid-80s in most fields, while morning lows will remain warmer than average, 60s-low 70s.

Arizona – Today, a deep trough of low pressure continues to induce moderate and gusty southerly winds over the low deserts, which will decrease in strength and shift to northwesterlies by Thursday afternoon. Through Friday, this pattern will also gradually cool the region. By Friday afternoon, highs in Yuma County will cool down to the mid-90s; in central Arizona, it'll be in the upper 90s to 101 today, then dropping to the mid-upper 90s by Friday afternoon. We should see low to mid-90s on Saturday afternoon.

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Commodities at a Glance

 APPLES	Quality is good, pricing is lower	 CITRUS (LEMONS)	Quality is fair, pricing is high	 MELON (CANTALOUPE)	Quality is good, pricing is high
 ASPARAGUS	Quality is good, pricing is steady	 CITRUS (LIMES)	Quality is good, pricing is steady	 MELON (HONEYDEW)	Quality is good, pricing is steady
 AVOCADO	Quality is good, pricing is high	 CITRUS (ORANGES)	Quality is good, pricing is high	 MELON (WATERMELON)	Quality is good, pricing is steady
 BELL PEPPERS	Quality is good, pricing is steady	 CUCUMBERS	Quality is good, pricing is steady	 MUSHROOM	Quality is good, pricing is low
 BERRIES (BLACKBERRIES)	Quality is fair, pricing is high	 EGGPLANT	Quality is good, pricing is steady	 ONIONS	Quality is good, pricing is high
 BERRIES (BLUEBERRIES)	Quality is fair pricing is high	 GARLIC	Quality is good, pricing is steady	 PEARS	Quality is good, pricing is high
 BERRIES (RASPBERRIES)	Quality is fair, pricing is steady	 GRAPES (GREEN)	Quality is good, pricing is high	 PINEAPPLES	Quality is good, pricing is steady
 BERRIES (STRAWBERRIES)	Quality is good, pricing is low	 GRAPES (RED)	Quality is good, pricing is high	 POTATOES	Quality is good, pricing is high
 BROCCOLI	Quality is good, pricing is steady	 GREEN ONIONS	Quality is good, pricing is steady	 SQUASH	Quality is good, pricing is steady
 BRUSSELS SPROUTS	Quality is fair, pricing is high	 KALE	Quality is good, pricing is steady	 STONE FRUIT	Quality is good, pricing is high
 CARROTS	Quality is good, pricing is steady	 LETTUCE ICEBERG	Quality is good, pricing is low	 TOMATOES	Quality is good, pricing is high
 CAULIFLOWER	Quality is fair, pricing is low	 LETTUCE LEAF	Quality is good, pricing is low		
 CELERY	Quality is fair, pricing is high	 LETTUCE TENDER LEAF	Quality is fair, pricing is steady		