

The Source

May 31, 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 –There are still good domestic supplies coming out of Washington and Michigan, which is helping to alleviate the shortages coming out of Mexico. Mexico's supplies should begin to pick up next week. 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 in June.

Avocados –The market is moving toward bigger sizes. In the next month or so, normal crop will come to an end. Next up is the Flora Loca crop. As of yet, there is no word on what the peak sizes will be for that crop.

Bell Peppers –Coachella's green bell production is in full swing. The quality and condition of the pepper are very good with a dark green color and a firm texture. Looking out east, Florida is about finished and Georgia is now the main growing region. Nogales is also just about done.

Berries (Blackberries) –A moderate amount of California production is beginning to appear on the market. The volume of crossings from Central Mexico is still low.

Berries (Blueberries) –There is still a tight market for this item. Transfers from Mexico are light. Over the next week or two, light numbers should begin to appear in the Central Valley of California. Georgia and North Carolina still have low volume due to weather conditions. In early July, a Pacific Northwest production is scheduled to begin.

Berries (Raspberries) –As we wait for local West Coast production to ramp up over the next few weeks, the industry remains short on this item.

Continued

Berries (Strawberries) –All current growing regions continue to produce large volumes of fruit. There are good promotional numbers available at a reduced price

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 –The supply of Brussels sprouts remains very limited. Oxnard normally begins the first of May, but has been delayed. As the weekend approaches, the market is expected to remain steady. Overall, seeders are being reported and it is causing lower yields and smaller sizing. Next week, supplies should improve.

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 –Overall, this market is steady. Suppliers may offer lower pricing later in the week compared to its competitors. There will be a price gap of ten to twenty dollars between suppliers in Salinas and southern California. All value-added items will continue to be subject to third-tier escalation. Seeder will continue to be an issue for shippers.

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 steady. The pricing spread is still a bit wide between large and small fruit, with larger sizes a bit tighter. Expect good supplies through June.

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. On the west coast, you can expect a 1-2 week gap in mandarins until offshore fruit is available.

Cucumbers –The price is steady to slightly higher. Production in Georgia has begun, and production in North Carolina will begin early next week. Baja continues to ramp up production out west. Next week, we can expect better overall supply.

Eggplant –Both coasts are fairly steady. There is a good supply coming out of the California desert. By next week, Georgia's supply will improve.

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

Grapes (Green & Red) –Fresh Mexican grapes are now crossing into Nogales in light volumes. Greens are crossing steadily now and there should be more reds by the weekend. Growers are still fighting maturity and many loads are being rejected at the border for not meeting minimum sugar requirements. 35 loads were rejected between Thursday and Friday. At historically elevated prices, the market is still firm. Greens are in the mid \$40s and reds are in the low \$50s. There are also some grapes trickling out of Coachella but volumes are very small. By the end of the month, we should see a more normal market.

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. Throughout the week, availability is expected to be moderate to good. In general, the quality is good, and the market is stable.

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Lettuce (Iceberg) –The market is flat. Multiple shippers are flexing on volume orders in Salinas and southern California. Salinas Valley has produced the best quality with weights averaging 40-45 pounds. Slight misshapen heads and outer leaf discoloration have been reported, but minimal. Expect good quality throughout the week with this commodity.

Lettuce Leaf – It is a steady market for romaine as well as green and red leaf lettuce. Throughout the week, supplies will be plentiful. You can also expect good supplies of romaine hearts. The shippers will be flexing throughout the week, so promote as much as possible. Quality continues to be strong in the Salinas Valley and this will continue throughout the week. Slight fringe burn has been reported, but it is minimal.

Lettuce Tender Leaf –Italian parsley and now spinach continue to be the tender leaf items that are limited. Salinas is still behind schedule due to the heavy rains we had back when growers were trying to plant the product. We hope the weather warms up and growth improves in the Salinas Valley over the next week.

Melons (Cantaloupe) –Yuma and Nogales are both peaking on small size melons. There are many more 15s being packed than 9s. The market is firm on larger fruit supply.

Melons (Honeydew) –Honeydews are in short supply as Yuma is fighting maturity and Nogales is in a mini gap as the deal moves from the southern district to the northern Sonoran district. Peaking in smaller sizes.

Melons (Watermelon) –The watermelon supply crossing through Nogales is tight. Seedless bins are mostly larger sizes.

Mushrooms –There is excellent availability, quality, and price.

Continued

Onions –California's desert is the main growing region. The harvest in New Mexico is ramping up. Demand exceeds available supply.

Pears –The market is slightly higher. Expect prices to gradually rise through July as storage supplies reach the end. The new crop of California Bartletts is projected to start the week of July 10th, but weather conditions could delay it.

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

Potatoes –The market remains extreme. While norkotahs will remain on the market until mid-June, Burbanks are the primary variety.

Squash –The market is slightly higher. Georgia squash production has reached its peak; North Carolina squash production will begin in about two weeks. Nogales is wrapping up, and California's Central Valley has started harvesting with great quality. Santa Maria will start in a light way in about 1-2 weeks.

Stone Fruit –California has started producing peaches, nectarines, and apricots. Due to the late start, there are still limited supplies. Every week, however, the volume will increase. This week, cherries are in better supply, and the market has adjusted lower.

Tomatoes –In both the east and west regions, markets are stronger as we move north. Baja and Quincy are picking up production, followed by the Carolinas. In Nogales, tomatoes will be available through early June. North California will begin the first week of July. Expect elevated markets through June.

A Peek at Peak Seasons

Blackberries (Past Peak Season)

Weather

California –Through Thursday, deep marine layer conditions will continue to cause cloudiness and spotty morning drizzle. In the morning, lows will be in the mid-40s to low 50s, while daytime highs will be in the upper 50s to mid-60s near the coast and in the upper 60s to upper 70s inland.

Mexico –As we move into the weekend, temperatures will gradually warm. Temperatures will be in the mid-70s to mid-80s on Thursday and mostly in the low 80s to near 90 on Thursday through Sunday. The morning temperatures are expected to fall into the mid-to-upper 50s over most of the region through June 4. There will be very little shower activity throughout the day on Sunday, with most areas expected to remain dry.

Florida –Through the weekend, a low-pressure area stalls in northern Florida, pushing plenty of moisture over the peninsula. Central and south Florida is expected to experience widespread moderate to heavy showers and thunderstorms today and tomorrow, followed by scattered light to moderate showers on Saturday and Sunday.

Arizona –Temperatures will remain below normal and wind gusts will reach 30-35 mph as an upper-level low passes over the region and ejects to the northeast. Temperatures will rise over the weekend as a high-pressure ridge rebuilds. It will be in the low to mid-90s on Friday, warming up to the upper 90s and 104 degrees on Sunday. Today's lows will be in the low 50s to the low 60s, warming to the mid-50s to the low 60s on Friday. Continued warming Sunday, low-mid 60s.

Freight



Trucks remain steady in California, Idaho, and the Northwest. The national diesel average remains steady and is currently at 3.855 per gallon. Prices in California are also steady at 4.810 per gallon.

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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 good, pricing is high	 GARLIC	Quality is good, pricing is steady	 PEARS	Quality is good, pricing is high
 BERRIES (RASPBERRIES)	Quality is good, 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 steady	 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 steady	 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 steady	 TOMATOES	Quality is good, pricing is high
 CAULIFLOWER	Quality is fair, pricing is low	 LETTUCE LEAF	Quality is good, pricing is steady		
 CELERY	Quality is fair, pricing is steady	 LETTUCE TENDER LEAF	Quality is fair, pricing is steady		