

The Source

Commodity of the Month - Potatoes



MARKET ALERTS

Blueberries - Limited supply and good quality.

Brussel Sprouts - Limited supply and quality is fair.

Green Onions - Limited supply and quality is fair.

SEPTEMBER 13, 2023

CROP UPDATES

Coastal California growing regions, including Oxnard, Santa Maria, and the Salinas Valley, are entering fall production ahead of normal schedules due to the continued summer temperatures and coastal marine layer. Inland regions will experience hotter temperatures and warm overnight temperatures, impacting texture and shelf life of fresh-cut/processed items. Current supplies are slightly ahead of schedule in many fields as demand increases and students return to school. Disease pressure is increasing in leafy green, celery, and other fields due to warm, humid overnight conditions. Fungicide sprays are being used to combat these issues. Leafy greens face challenges like mildew and insect pressure, while broccoli supplies show bead discoloration and a branchy crown. [Read more](#)

WEATHER

Arizona - The temperature is expected to drop starting Monday afternoon and continue through midweek as increasing moisture levels bring more cloudiness and the chance of light showers by Tuesday evening.

California - Near the coast, morning lows will be in the mid-40s to mid-50s and daytime highs will be in the mid-60s to low 70s. In the southern Salinas Valley, maximum temperatures reach the upper 70s to mid 90s, but fall to the mid 70s to low 90s as the day progresses.

Florida - There will be high temperatures in the upper 80s to low 90s along the coast and mostly in the low-mid 90s inland. Through Thursday morning, morning temperatures will be in the low-upper 70s. By Friday morning, they will be in the upper 60s and mid-70s.

Mexico - Mostly mid-70s to mid-80s through Wednesday, and upper 70s to upper 80s by Thursday and Friday.

FREIGHT

Fuel prices are active. Shipper delays in Salinas are improving due to weather. Truck capacity in the Northwest is still strained due to new crop of apples, potatoes, and onions.

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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

\$\$\$

Fair



Asparagus

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

\$\$\$

Fair

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)	Light	\$\$\$	Fair
Ohio/NC/MI (June-September)	Steady	\$\$\$	Good



Eggplant

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



Garlic

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



Grapes (Green)

San Joaquin Valley (June-November)	Steady	\$\$\$	Good
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Commodity/Region Supply Price Quality



Grapes (Red)

San Joaquin Valley (June-December)	Steady	\$\$\$	Good
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Green Onions

ALERT

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



Kale

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



Lettuce Iceberg

Mexico (Year Round)	Steady	\$\$\$	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



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



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

The new Granny Smith crop has begun in Washington. By far, Washington state is the largest producer of this variety. Granny's are an alternate bearing crop. This is looking to be a very heavy production year for them.

Asparagus

As Central Mexico finishes over the next few weeks, we are still in a transition period with Mexican asparagus. Sizes out of Central Mexico continue to be on the smaller side, mostly standards and smalls with very limited larger sizes. As the month progresses, the focus will shift to the Southern Baja region, particularly Constitucion, where business has started slowly but is expected to increase.

As Southern harvest areas come on, we are beginning to see a slight increase in Peruvian asparagus supply. Typically, the south of Peru represents large volume that can arrive in late September to early October. However, with the continued production issues we have seen this year related to El Nino weather patterns, there is still uncertainty how things will progress. At the moment, things continue to stay relatively consistent regarding volume. Suppliers expect to see 105 containers arriving this Friday September 15th compared to 98 from last week. The sizing from Peru is starting to improve with larger sizes becoming more available.

Avocados

48ct and larger sizes continue to rise, but the market has slowed down. This is due to customers ordering what they need and not over purchasing. Due to this, MX reduces their price and ships more into the states. Hearing that it will tick back up with CA finishing, as well as Peru's supply dwindling down. The Flora Loca crop is finishing up; Adventajada is next. The adventajada crop will peak on 6Oct and smaller, but I'll keep everyone updated if that changes.

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Bell Peppers

Overall, availability and quality are good, and prices are steady. In the east, crops have started transitioning south, with Georgia starting in about two weeks. Expect steady supplies for September.



Berries (Blackberries)

At this time, availability is very limited. Production in Mexico is expected to pick up over the next two to three weeks, but most shippers will only cover contracts until then.



Berries (Blueberries)

We are in a gap period and markets are in a demand-exceeds-supply situation. PNW is drawing to a close, with Michigan ending abruptly last week. Peruvian and Argentine imports have been arriving sporadically. We should see better numbers in the next 2 weeks from these areas. Production in Mexico will pick up in mid-October. Dover, FL is quoting limited supplies of offshore fruit.

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Berries (Raspberries)

Plants have not reacted well to the heat, rain, and humidity produced by Hurricane Hilary on the Central California Coast. Baja numbers are down.

Berries (Strawberries)

Salinas and Watsonville are moving past the big numbers that were produced last week. The new crop of fruit from Santa Maria and Oxnard is coming on line with very weak demand. Once ads are in place and demand picks up, we should see markets remain flat.

Broccoli

Santa Maria and Salinas have a steady supply of broccoli this week, including florets. Mexico's supplies have also improved. Overall, the quality is fair to good. As we approach the weekend, this market is expected to remain steady.

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Brussel Sprouts

Brussels sprout demand continues to exceed supply. Mexico's erratic weather continues to cause quality issues, resulting in tight supplies. As the weekend approaches, the market is expected to remain high and steady. Salinas and Oxnard have reported low yields and smaller sizes due to seeders and discoloration. Hoping Salinas supplies pick up slightly by the end of this week. Until then, supplies will remain tight.

Carrots

The market for Jumbos is steady at a slightly higher level due to the lack of size in Mexico, Texas and Canada. This in turn increases demand on California supply.

Cauliflower

Cauliflower supplies are beginning to tighten. The fields have come forward in recent weeks, and most are now behind and yielding to smaller sizes. As we approach the weekend, you can expect this market to start rising.

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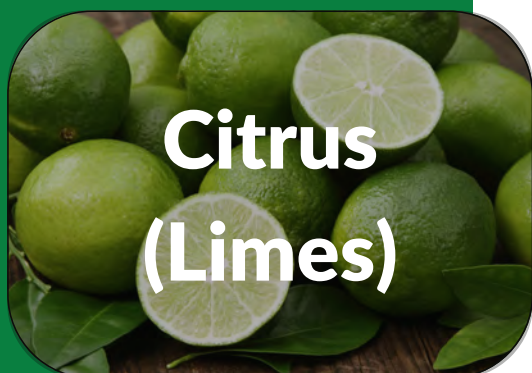
Celery

There is a stronger market for this commodity. Fusarium has been found in a few fields in Salinas. As a result, supplies in the Salinas valley have tightened. Santa Maria/Oxnard continue to have good supplies available, so overall expect steady supplies this week. Twenty-four counts continue to have the best sizing. The light production in Florida will continue through the week.



Citrus (Lemons)

District 2 is nearing the end of its season, and markets remain elevated across the board. Lemons are tight across the board and will remain so until District 3 gets going. District 3 (California desert/Arizona) is scheduled to start shipping late-September/early-October. Offshore product is available on both coasts.



Citrus (Limes)

Heavy grading continues to keep prices elevated. The fruit is peaking at small to medium sizes. By October, volumes are expected to increase with more stable markets.

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Citrus (Oranges)

Markets continue to be strong as school demand is in full effect. Through the remainder of the Valencia season, 113ct and 138ct prices will remain elevated. The peak sizes are 72ct and 88ct. The hot temperatures in the Central Valley will soon cause fruit to re-green (a normal occurrence at this time of year). It is purely cosmetic and does not affect the flavor of the fruit. Domestic Navels are expected to start up mid/late October. Other quality issues in play are softer fruit/pack pressure & stem-end aging due to increased temperatures in the growing region. Offshore product is available on both coasts.

Cucumbers

There is a light supply overall with good quality; local deals are winding down. Until Nogales starts in mid-October, western supply will remain steady.

Eggplant

As we move into fall with cooler temperatures, the eastern supply is adequate. GA is expected to begin in three weeks. CA continues to struggle with light supplies and quality. Coachella begins in October followed by Nogales.

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Garlic

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

Grapes (Green)

The grape market continues to advance in price as the industry deals with the sudden crop loss from the storm. This market will remain high and tight for the balance of the domestic season.

Grapes (Red)

The grape market continues to advance in price as the industry deals with the sudden crop loss from the storm. This market will remain high and tight for the balance of the domestic season.

Commodity Updates



Green Onions

As a result of Hurricane Hilary's heavy rains and the recent extreme heat in Mexicali, green onions continue to be 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

Market conditions remain steady. The availability is expected to be moderate to good throughout the week. Quality is good and the market is stable.

Lettuce Iceberg

Apart from a few suppliers, this market remains steady. The ideal weather conditions in the growing regions have made this commodity readily available. Weights on this item have varied from 35 to 43 pounds, with occasional puffiness and outer leaf discoloration. Pricing has firmed up. As mentioned last week, some suppliers expect lighter availability of product in the next few weeks.

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Lettuce Leaf

Throughout the week, there will be good supplies of romaine, green leaf, and red leaf. There will be romaine hearts in all pack sizes available from suppliers as well. Some shippers are flexing so promote as much as possible. Quality is expected to be strong in both northern and southern CA regions. As mentioned last week, the surplus of product now will likely cause a production gap in a few weeks, so please be aware.

Lettuce Tender Leaf

Due to the recent heat and warmer nights, spring mix, tender greens, and spinach are all tightening up. The cooler nights ahead should help improve quality.

Melon (Cantaloupe)

Melons are primarily shipping from the San Joaquin Valley. Rain from hurricane Hilary and the Labor Day pull increased the markets, but they are starting to normalize now. The cooler temperatures (low to mid 90s) have produced better fruit size. 15s are still limited, and jumbos may be affected by cooler weather.

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Melon (Honeydew)



Honeydews are shipping from the San Joaquin Valley, where temperatures are cooler at night. Suppliers are primarily shipping 5 and 6s with 8s being limited. As harvest crews pick later in the day, quality remains high. As school orders increase, demand remains steady

Melon (Watermelon)



Despite a decrease in demand, watermelon production remains steady. Retailers are beginning to transition to Fall/Winter crops. Supply and quality remain steady, and suppliers don't need to push the crop.

Mushroom



There are excellent supplies and promotable volumes available.

Commodity Updates



Onions

Onion harvesting continues with excellent quality available in all sizes.

Pears

This week, most shippers are packing Bartletts in Washington. California pear shippers are starting to pack the mountain district. At the moment, Bartletts, Boscs, and Red pears are all being shipped.

Pineapples

Despite ongoing storms in the tropics, pineapple supplies remain scarce. Supplies are usually tight during this time of the year, but with excess storms, product remains extremely limited. All sizes are affected. It is expected to last for three to four weeks.

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Potatoes

As harvesting continues, market declines are expected until harvest is complete. There is a firm price for 40 CT, and #2s. There are deals available on all other sizes.

Squash

There is a bit of a shortage as some areas are between their summer and fall planting seasons. There could be some rain-related pressure on GA. It is expected that squash in Baja will rebound by the end of September as Santa Maria remains the primary region. Nogales has started to see some squash.

Stone Fruit

The production of Asian pears has begun and will continue through December. Most shippers are finishing their peaches this month as demand continues to exceed supply. A few will pack into October. Nectarines are beginning to finish and will most likely be done by the end of the month. Plums are tightening up, and the market is rising. Plums are starting to wind down with some shippers and will finish by the end of September.

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Tomatoes

Grape FOB's are lower but markets are firm. There is a light to steady supply of grapes in the eastern states as quality is expected to improve with better weather. S TX crossings are moderate, Baja volumes are improving post-Hilary, and CA production is steady with large and XL fruit peaking.

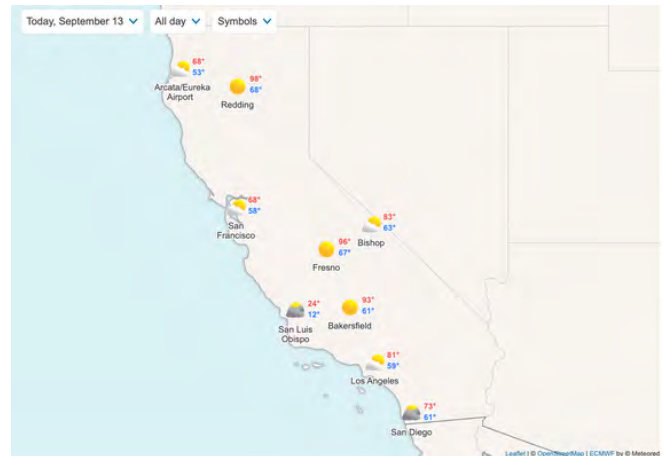
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Weather Updates



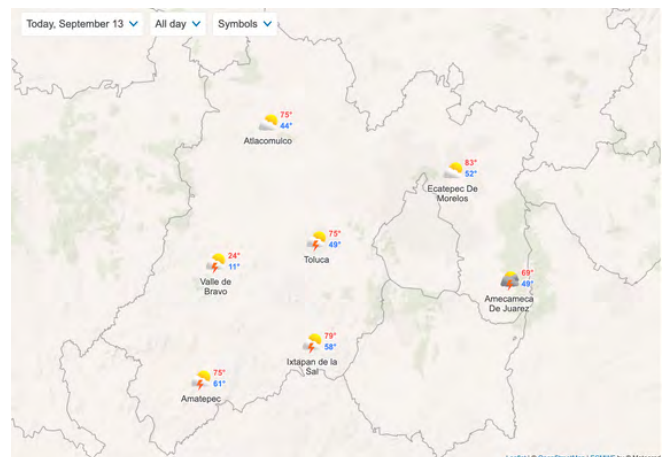
CALIFORNIA

Through midweek, high pressure will weaken, deepening the marine layer and cooling temperatures to near average. Near the coast, morning lows will be in the mid 40s to mid 50s and daytime highs will be in the mid 60s to low 70s. In the southern Salinas Valley, maximum temperatures reach the upper 70s to mid 90s, but fall to the mid 70s to low 90s as the day progresses. Temperatures and marine layer levels will remain at these levels through the end of the week.



MEXICO

Over much of Central Mexico's growing area, temperatures are expected to be seasonably warm over the next five days. Through Sep 15th, a few isolated afternoon or evening showers are also expected. Mostly mid-70s to mid-80s through Wednesday, and upper 70s to upper 80s by Thursday and Friday. Through Friday morning, temperatures will be seasonably cool with mostly low 50s to low 60s expected across the region.



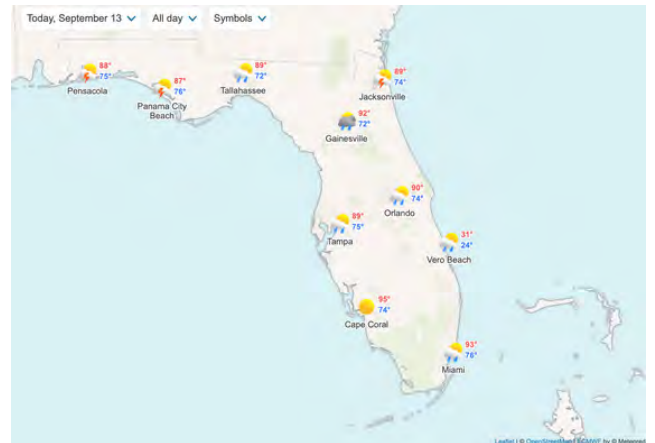
For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

Weather Updates



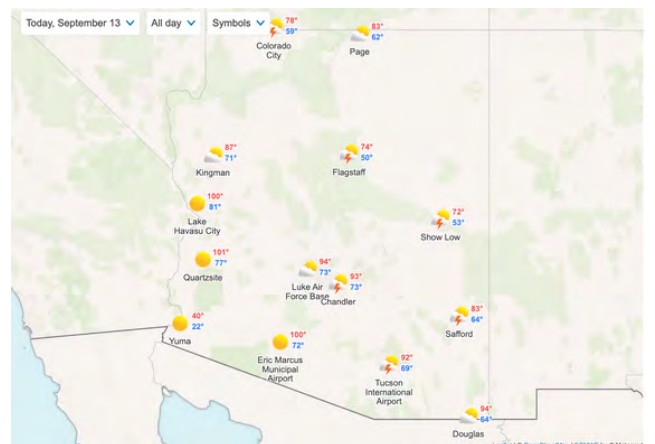
FLORIDA

In the northwest of the Florida peninsula, a cold front has stalled. By Wednesday or Thursday, a new cold front will approach the region. Shower activity will remain possible along sea breeze boundaries through the end of the week. This will give slightly better chances for rain as we head toward the end of the week with the cold frontal system. There will be high temperatures in the upper 80s to low 90s along the coast and mostly in the low-mid 90s inland. Through Thursday morning, morning temperatures will be in the low-upper 70s. By Friday morning, they will be in the upper 60s and mid 70s.



ARIZONA

The temperature is expected to drop starting Monday afternoon and continue through midweek as increasing moisture levels bring more cloudiness and the chance of light showers by Tuesday evening. A trace or so of rain could fall over Yuma late Tuesday night, but the best odds for measurable rainfall are expected in central Arizona and higher terrain. On Thursday and Friday, the air will be dryer.



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

Freight Updates

Fuel prices are active.

Shipper delays in Salinas are improving due to weather.

Truck capacity in the Northwest is still strained due to new crop of apples, potatoes, and onions.



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

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

	08/28/23	09/04/23	09/11/23	Change from	
				week ago	year ago
U.S.	4.475	4.492	4.540	▲ 0.048	▼ -0.493
East Coast (PADD1)	4.475	4.474	4.479	▲ 0.005	▼ -0.470
New England (PADD1A)	4.433	4.467	4.478	▲ 0.011	▼ -0.609
Central Atlantic (PADD1B)	4.616	4.625	4.651	▲ 0.026	▼ -0.483
Lower Atlantic (PADD1C)	4.429	4.419	4.417	▼ -0.002	▼ -0.448
Midwest (PADD2)	4.385	4.383	4.427	▲ 0.044	▼ -0.658
Gulf Coast (PADD3)	4.169	4.171	4.212	▲ 0.041	▼ -0.548
Rocky Mountain (PADD4)	4.658	4.727	4.810	▲ 0.083	▼ -0.151
West Coast (PADD5)	5.302	5.390	5.535	▲ 0.145	▼ -0.123
West Coast less California	4.973	5.028	5.153	▲ 0.125	▼ -0.064
California	5.678	5.801	5.970	▲ 0.169	▼ -0.194

*prices include all taxes

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

Crop Insights



The Coastal California growing regions of Oxnard, Santa Maria and the Salinas Valley move into fall production slightly ahead of normal harvest schedules. The rollercoaster of summer temperatures will continue across these growing regions along with the coastal marine layer, especially for fields near the coast. Inland regions will continue to see some hotter temperatures and generally warm overnight temperatures as we move into fall. These warmer temperatures allow for continued growth overnight in these stands impacting texture and shelf life, especially in fresh-cut/processed items. Processed items will continue to have a reduced shelf life and should be used as quickly as possible, keeping a close eye on rotation. Current supplies remain slightly ahead of schedule in many fields as demand increases and students return to school.

There have been some reports of disease pressure showing up in leafy green, celery, and other fields in certain locations across the valley. The continued warm, humid overnight conditions will increase mold, mildew, and disease pressure including sclerotinia, fusarium, and downy mildew which are caused by a soil-inhabiting fungus. The fungi can persist for long periods in the soil and are spread by wind or equipment in moist humid conditions. Compared to last summer we are seeing less disease pressure at the moment, however, it is not a matter of if but when we will see an increase in disease pressure. Growers are emphasizing the use of fungicide sprays to combat the problem as we move into fall harvesting. Mildew continues to be the biggest challenge in leafy greens at the moment. Insect pressure is also on the rise with the winter rains allowing for plenty of insect habitats and increased insect populations. Some seeders along with fringe and tip burn are also being reported in current leaf supplies. Tip burn occurs when environmental conditions favor rapid succulent growth, warm temperatures, excessive soil moisture or fertility, and warm night temperatures with high relative humidity. Broccoli supplies are showing some bead discoloration along with a branchy crown. The tender spring mix and cilantro have also been impacted by the heat and warm, humid overnight temperatures with some discoloration and a weaker texture. Brussels sprouts will continue to show small sizing and occasional seeders are also being reported.



TIM LYNCH
QUALITY ASSURANCE