

The Source

Commodity of the Month - Potatoes



MARKET ALERTS

Blueberries - Limited supply and good quality.

Broccoli - Steady supply and quality is fair to poor.

Brussel Sprouts - Limited supply and quality is fair.

Green Onions - Limited supply and quality is fair.

SEPTEMBER 27, 2023

CROP UPDATES

Fall weather forecasts in California are predicting cooler temperatures for Coastal California growing regions, including Oxnard, Santa Maria, and the Salinas Valley. A winter-type storm system in the Pacific Northwest is expected to bring rain, winds, and cooler temperatures, potentially impacting apple, potato, and onion harvests. Central California may see rain in Huron and grape-growing regions. Lower yields are expected for many crops, with celery and leaf plantings in Oxnard and Huron on schedule. In the Salinas Valley, insect and disease pressure is rising, with lettuce and romaine yields expected to remain lighter. [Read more](#)

WEATHER

Arizona - Moderate high pressure producing near-to-above normal temperatures and dry conditions through Thursday. Starting Friday, a low-pressure system moving into the western US will cool the region and increase winds.

California - The morning lows will be in the low 40s to mid-50s, while the maximum temps along the coast will be in the mid-60s. Santa Clara Valley highs are expected to reach low-mid 70s, while Salinas Valley highs are expected to reach low-mid 80s.

Florida - There will be a stalled frontal boundary over Florida on Tuesday and Thursday, and a cold front will push southward on Friday. With the more onshore flow, showers and t-storms will continue in the area during this period.

Mexico - Through Saturday, high temperatures are expected to be mostly in the upper 70s and upper 80s. Lows should cool down into the low 50s to low 60s most mornings across the fields of Central Mexico.

FREIGHT

Steady supplies of trucks from California this week. Fuel prices continue to increase, especially in the western states.



PRO*ACT
2023 SUMMIT

October 9-11, 2023
Monterey Marriott

AT PEAK SEASON

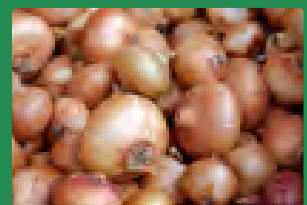


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Commodities at a Glance



Commodity/Region Supply Price Quality



Apples

Yakima, Washington (August-July)	Steady	\$\$\$	Good
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Asparagus

Caborca (Year Round)	Light	\$\$\$	Fair
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Ciudad Obregon (Year Round)	Steady	\$\$\$	Fair
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Peru (Year Round)	Steady	\$\$\$	Fair
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Avocados

Mexico (Year Round)	Light	\$\$\$	Good
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Bell Peppers

California (May-October)	Steady	\$\$\$	Good
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Ohio/NC/MI (July-September)	Light	\$\$\$	Good
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Commodity/Region Supply Price Quality



Berries (Blackberries)

California (Year Round)	Light	\$\$\$	Fair
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McAllen, Texas (October-May)	Light	\$\$\$	Good
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Berries (Blueberries)

ALERT

California (Year Round)	Light	\$\$\$	Good
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Dover, Florida (Year Round)	Light	\$\$\$	Good
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McAllen, Texas (October-May)	Light	\$\$\$	Good
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Berries (Raspberries)

California (Year Round)	Light	\$\$\$	Fair
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Dover, Florida (Year Round)	Light	\$\$\$	Good
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Berries (Strawberries)

California (Year Round)	Steady	\$\$\$	Fair
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Dover, Florida (Year Round)	Steady	\$\$\$	Fair
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Commodities at a Glance



Commodity/Region Supply Price Quality



Broccoli

ALERT

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

Commodity/Region Supply Price Quality



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

Commodity Updates



Apples

The majority of varieties are now packing in new crops. The quality and supply are excellent. Mid-October should be the start of the new crop of pinks.

Asparagus

Producing Mexican asparagus in Constitucion, a southern Baja region, should increase over the next few weeks. There are some concerns about the quality of this asparagus due to its heavy seeding and spreading. Shelf-life will also be limited. In the aftermath of Hurricane Hilary, the temperatures quickly returned to the low 100's and are still very hot, which has produced a lot of the quality issues we are seeing now. In the next two weeks, we expect this initial push of supply to last. Eventually, the crops should level off or even begin to decline. In late October and early November there will be some harvest from the Sonora region, but there are many concerns about whether this production will be ready for Thanksgiving orders.

Growing areas of Peruvian asparagus are centered around Ica, the largest region. Raw material quality has improved over the past few weeks with cooler weather. With spears 8.5"-10.5" long and compact green tips, pack-outs are higher. If it gets too hot too fast, both production and quality could drop. Recently, some EU restrictions could lead to fumigation supply chain problems, so less raw material is being sent to Europe, providing more boat and air availability for the US.

Avocados

60ct and larger sizes remain escalated. Current Flora Loca crop is finishing with the Adventajada crop up next. As the main grade of fruit is #1, Flora Loca remains extremely tight on #2 grade fruit. Since the size curve has shifted, 70ct/84ct sizes will be extremely tight for the next 2-3 weeks. Flexibility in alternate country of origin and size exceptions will be needed to cover orders. Adventajada crop is expected to have better availability in all sizes with a higher percentage of #2 grade fruit available. Peru is dwindling down and is expected to finish in the next 2-3 weeks. Please send orders with as much lead time as possible to help with ripening and inventory planning.

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Bell Peppers

Steady on greens. GA starts this week, followed by Coachella in about 2-3 weeks. Over the next few weeks, expect an active market once local programs conclude. Prices for colored bells are slightly lower, but they are still limited.



Berries (Blackberries)

The supplies coming out of the Central Coast of California, Baja, and Central Mexico are steady but still on the light side. In mid-October, we should see better numbers out of Mexico, and they will continue to rise through December. Product crossing in from Mexico has already started to appear in a small way. As strawberries cross and mixed berries consolidate in the area, we should see full FOB offerings from late October to mid-December.



Berries (Blueberries)

We are in a demand-exceeds-supply situation as we work our way through a deep planting gap. Domestic crops are finished and Mexican production is several weeks away. The effects of El Nino events in Peru have caused delays and a significant drop in production. Higher temperatures and other adverse growing conditions have caused bloom drop and consequentially lower production rates. This is expected to continue through October.

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Only the Finest Berries™

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Berries (Raspberries)

With Baja production and Central Mexico continuing to bolster availability, there is a good supply of fruit coming out of the Central Coast.

Product crossing in from Mexico has already appeared in a small way. As strawberries begin crossing and mixed berries consolidate in the area, we will see full FOB offerings in late October to mid-December.



Berries (Strawberries)

Salinas and Watsonville continue to have steady but declining numbers. There is good availability of new crop fruit in Santa Maria and Oxnard.



Broccoli

The supply of broccoli is tightening up. A quality issue has resulted in lower yields, resulting in a lighter supply overall. There is pin rot, yellow beads, hollow cores, and decay in the fields, reducing production. A majority of these quality issues are visible at harvest, and harvesters are leaving affected heads behind. As school demand returns, broccoli florets are being squeezed to fill pipelines and overall supplies in carton packs are under pressure.

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Brussel Sprouts

Brussel sprout demand continues to exceed supply. Due to Mexico's erratic weather, quality issues persist, resulting in a shortage of supplies. As the weekend approaches, the market is expected to remain high and steady. Salinas and Oxnard have experienced low yields and smaller sizes due to seeders and discoloration. We hope Salinas supplies start picking up going into next week.

Carrots

As a result of the lack of size in Mexico, Texas and Canada, the market for Jumbos is steady at a slightly higher level.

Cauliflower

There is a steady supply of cauliflower. The fields have come forward in recent weeks, and now harvesters are right on top of their fields. We can expect this market to remain steady as we approach the weekend.

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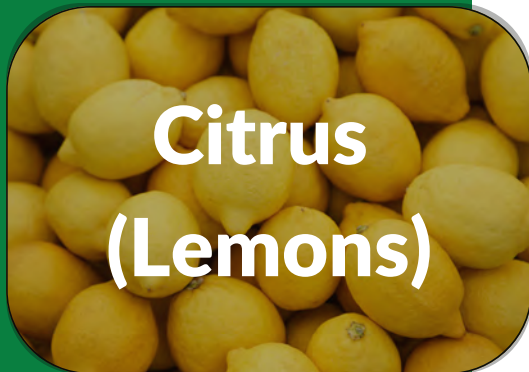
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Commodity Updates



Celery

As a result of the lack of production in Salinas, supplies remain light. With this commodity, expect firm to rising markets throughout this week. A smaller size will continue to be less available compared to a larger size. Salinas and Santa Maria/Oxnard continue to have above-average quality. Southern California offers the best pricing.



Citrus (Lemons)

Prices continue to rise. You can expect to pay a premium for good quality fruit. We are now in new crop, which was affected by the weather. We will continue to see low yields and elevated markets into October.



Citrus (Limes)

The market continues to be strong as school demand is in full swing. Through the remainder of the Valencia season, 113ct and 138ct will remain at elevated prices. The peak sizes are 72ct and 88ct. With the hot temps in the Central Valley, we can expect fruit to begin re-greening soon (normal this time of year). It is purely cosmetic and does not affect the flavor of the fruit. Mid/late October is expected to be the start date for domestic navels. The increased temperatures in the growing region also cause softer fruit/pack pressure and stem-end aging. The offshore product is available on both coasts.

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Commodity Updates



Citrus (Oranges)

As school demand is in full swing, markets remain strong. 113ct and 138ct will remain at elevated prices for the remainder of the Valencia season. The peak sizes are 72ct and 88ct. With the hot temps in the Central Valley, we can expect fruit to begin re-greening soon (normal this time of year). It is purely cosmetic and does not affect the flavor of the fruit. Mid/late October is expected to be the start date for domestic navels. Due to the increased temperatures in the growing region, softer fruit/pack pressure and stem-end aging are also concerns. Offshore product is available on both coasts.

Cucumbers

Local is wrapping up as new regions ramp up in GA/NC. Baja is still going with good supply and strong quality. Nogales will come online in about 3 weeks. English cucumbers are gapping out of Canada; expect an active market until MX gets rolling in November.

Eggplant

Fairly steady markets. GA is just getting started, and Coachella will follow soon. There is a bit better availability in CA as new blocks get started.

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Commodity Updates



Garlic

California's production is expected to remain steady throughout the week. Quality has been reported to be good.

Grapes (Green)

Domestic grapes are expected to be available through October for most shippers. There may be a short gap between the end of the domestic crop and the start of Peruvian imports in November. Despite the sudden crop loss caused by the storm, the grape market continues to advance in price. For the remainder of the domestic season, this market will remain high and tight.

Grapes (Red)

Domestic grapes are expected to be available through October for most shippers. There may be a short gap between the end of the domestic crop and the start of Peruvian imports in November. Despite the sudden crop loss caused by the storm, the grape market continues to advance in price. For the remainder of the domestic season, this market will remain high and tight.

Commodity Updates



Green Onions

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

Kale

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

Lettuce Iceberg

This commodity will continue to have light supplies and stronger markets throughout this week. In both northern and southern California, shippers expect moderate to light supplies throughout the week. INSV is present in some fields in Salinas, but its impact is not as great as last year. Nonetheless, production has slowed down. The average weight is 34-40 pounds. There will still be misshapen heads, puffiness, and discoloration on the outer leaves upon arrival. This week, markets are expected to rise.

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Lettuce Leaf

The supply of romaine and green and red leaves has been steady throughout the week. Some shippers are better off than others and this has created a pricing gap industry wide. The production of romaine hearts will remain moderate throughout this week. Common defects include tip and fringe burn in a light way with most leaf items. Overall, the quality is above average, with good weights reported.

Lettuce Tender Leaf

Due to the recent heat and warmer nights, spring mix, tender greens, and spinach are slightly tighter this week. Due to the recent warmer days and nights, yields have been lowered due to quality issues. The cooler nights ahead may improve quality and supply.

Melon (Cantaloupe)

Cantaloupes from the San Joaquin Valley remain high in quality and supply remains steady. Cooler temperatures are limiting the size of smaller fruit. At the moment, cantaloupes are peaking on 9s, with some Jumbo 9s and 12s available as well. Shippers are finishing up the Westside deal, and the Yuma transition will heat up the market. The Yuma product will be available starting on 10/16/2023.

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Melon (Honeydew)



San Joaquin Valley honeydews are still being shipped, though some suppliers are experiencing supply gaps. As we transition to Yuma, the market is expected to heat up. Despite the limited availability of smaller sizes (6/8), quality remains high.

Melon (Watermelon)



Seedless watermelon is in short supply. The Mexican watermelon season will begin in the middle of October. The mini-conventional and organic watermelon season is set to end this week. In terms of supply, mini's are peaking at 6s, while 8s and 11s are lower.

Mushroom



There is an excellent supply and availability.

Commodity Updates



Onions

Harvest has concluded and onions will be shipped from storages. There is an excellent supply and availability.

Pears

Anjous, Bosc, and Bartletts are now being packed in Washington. The mountain district Bartletts are being packed by California pear shippers. Currently, Bartletts, Boscs, and Red pears are all being shipped.

Pineapples

Due to continued storms in the tropics, pineapple supplies remain scarce. The supply of product is usually tight during this time of year, but with excessive storms, product is extremely limited. All sizes are affected. During the next two weeks, this will continue.

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Commodity Updates



Potatoes

Supply and availability are excellent. New crop harvest is concluding. 40 CT remains the tightest size. The crop profile is peaking at 80 CT.

Squash

As GA/MX production increases, markets remain stable despite the end of the local program. Santa Maria, Baja, Nogales, Georgia, and NC all have squash. There is a promotional volume available.

Stone Fruit

The nectarine season is effectively over. There are a few pallets here and there, but nothing in volume. The demand for peaches continues to exceed supply, with most shippers finishing this month. Some will pack into October. The availability of plums is mostly steady, with more blacks than reds. Plums should run into November. Pluots are winding down with some shippers and will finish by the end of September. Asian pears have will run through December.

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Commodity Updates



Tomatoes

The availability is lightening up from NC/TN around mid-October, around the time Quincy will get rolling, followed by the Ruskin/Palmetto area. The numbers out west are moderate, CA is rolling through October, and Baja has passed storm-related issues and is moving into better quality.

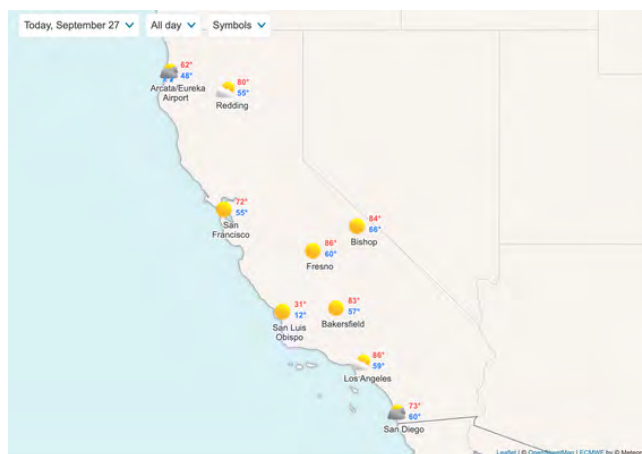
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Weather Updates



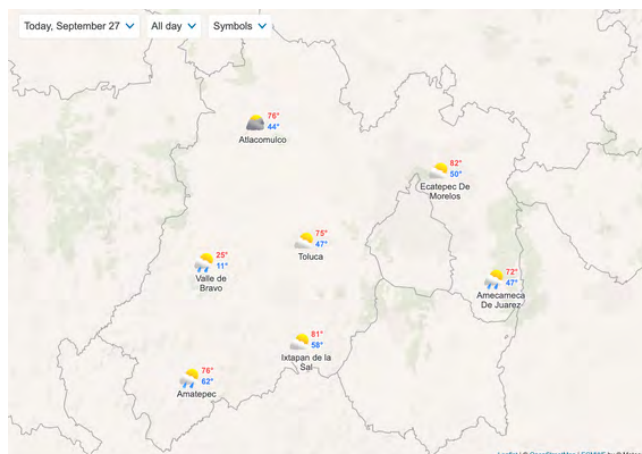
CALIFORNIA

For the week, the weather has been below average. The morning lows will be in the low 40s to mid 50s, while the maximum temps along the coast will be in the mid-60s. Santa Clara Valley highs are expected to reach low-mid 70s, while Salinas Valley highs are expected to reach low-mid 80s. Afterward, high pressure builds over the area, with maximum temperatures along the coast reaching the mid 60s to mid 70s and further inland reaching the upper 70s to low 90s. In the final days of the week, the high slowly weakens to drop temperatures back to slightly below normal.



MEXICO

Through September 30th, temperatures should remain near normal. A few isolated showers and sprinkles are possible into the weekend, but mostly dry through the week. Through Saturday, high temperatures are expected to be mostly in the upper 70s and upper 80s. Lows should cool down into the low 50s to low 60s most mornings across the fields of Central Mexico.



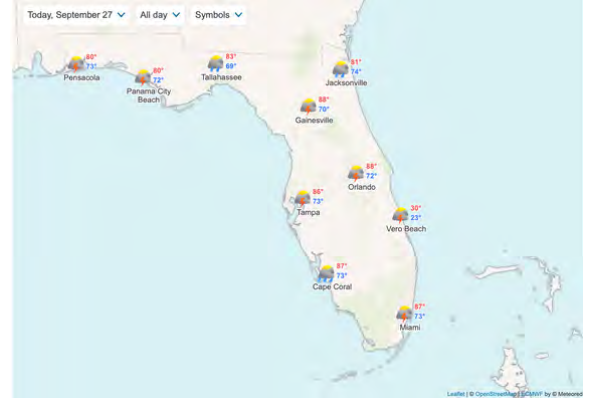
For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

Weather Updates



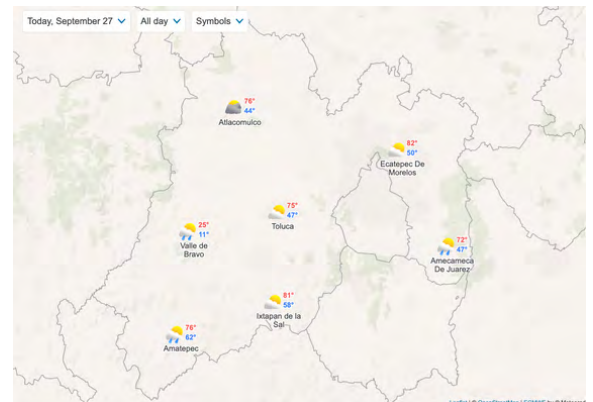
FLORIDA

There will be a stalled frontal boundary over Florida on Tuesday and Thursday, and a cold front will push southward on Friday. With the more onshore flow, showers and t-storms will continue in the area during this period.



ARIZONA

It's going to be a quiet weather pattern this coming week with moderate high pressure producing near-to-above normal temperatures and dry conditions through Thursday. Starting Friday, a low-pressure system moving into western US will cool the region and increase winds.



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

Freight Updates



South Texas spot market is active, especially for long haul. Steady supplies of trucks from California this week. Idaho/Washington border continues to pull capacity from Salt lake creating an elevated demand for trucks in that region. Fuel prices continue to increase, especially in the western states.



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

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

	09/11/23	09/18/23	09/25/23	Change from	
				week ago	year ago
U.S.	4.540	4.633	4.586	↓ -0.047	↓ -0.303
East Coast (PADD1)	4.479	4.537	4.525	↓ -0.012	↓ -0.311
New England (PADD1A)	4.478	4.587	4.607	↑ 0.020	↓ -0.360
Central Atlantic (PADD1B)	4.651	4.748	4.764	↑ 0.016	↓ -0.260
Lower Atlantic (PADD1C)	4.417	4.456	4.429	↓ -0.027	↓ -0.323
Midwest (PADD2)	4.427	4.492	4.439	↓ -0.053	↓ -0.442
Gulf Coast (PADD3)	4.212	4.352	4.281	↓ -0.071	↓ -0.342
Rocky Mountain (PADD4)	4.810	4.864	4.801	↓ -0.063	↓ -0.084
West Coast (PADD5)	5.535	5.695	5.687	↓ -0.008	↑ 0.120
West Coast less California	5.153	5.260	5.229	↓ -0.031	↑ 0.135
California	5.970	6.192	6.208	↑ 0.016	↑ 0.098

*prices include all taxes

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

Crop Insights



As we move into fall cooler temperatures are forecast for the Coastal California growing regions of Oxnard, Santa Maria, and the Salinas Valley as well as the west in general. A significant winter-type storm system last week in the Pacific Northwest looks to be followed by a few more systems as a powerful upper-level system sends a series of fronts into the Northwest. These systems will bring rain, winds, and cooler temperatures spreading into Oregon, Washington, and Idaho. This has the potential to impact apple, potato, and onion harvests in the region.

In Central California, the tail end of the current system may bring rain to the transition area of Huron and the grape-growing regions over the weekend. Although confidence is low on rain amounts cooler temperatures and some moisture are expected. This pattern of storm systems to the northwest will cool temperatures across California and the desert-growing regions of Arizona. Fall weather patterns of less daylight hours and cooler temperatures will typically bring lower yields for many crops. Celery and leaf plantings in the Oxnard region continue on schedule as growers report some fusarium and wilt issues in these fields. Early celery plantings may be in jeopardy in the area as fusarium continues to impact these fields.

The Huron region continues on track with lettuce, romaine, and mixed leaf as growers watch for possible rain over the weekend. Production from this transition region is slated to begin around mid-October, lasting into mid-November. Previous hot temperatures have caused some heat-related damage to these lettuce stands however the overall crop looks to be in good shape.

Plantings in Yuma are now underway for all crops. The area experienced some severe wind and rain in early September impacting the broccoli, cauliflower, and cabbage fields. This will affect mainly broccoli with early harvest set for late November possibly impacted. Other plantings had to be pushed back as the fields dried out. Growers are reporting that other crops in these desert locals are looking good currently.

In the Salinas Valley overall insect and disease pressure continues to rise in many of these late-season crops. Club root is currently being reported in the Cole crops (broccoli, cauliflower, brussels sprouts, etc.) with fusarium the main culprit in the upcoming celery fields. Soil-related diseases continue to lower yields in the lettuce and romaine stands as mildew continues to be a challenge in the leafy green fields. Growers are emphasizing the use of fungicide sprays to combat the problem as we move into fall harvesting. Broccoli yields are expected to remain on the lighter side in the near term with some bead discoloration, brown bead, and hollow core reported. INSV while not as pervasive as last fall is starting to show up in some areas of the valley. Growers will be keeping a close eye on this and other diseases to try to stay ahead of any major outbreaks.

The tender spring mix, spinach, and cilantro items should benefit from the shorter days and cooler temperatures. This will slow growth and build leaf strength improving the overall texture of the product.

In the Northeast growers are assessing damage from tropical storm Ophelia that brought strong winds and heavy rains from eastern North Carolina northward into Canada. This will impact many local supplies along the Northeastern Seaboard that were nearing the tail end of their season. Many crops (beans, peppers, squash, tomatoes eggplant) were in the line of fire as growers continue to assess the impacts of the storm.

As always upcoming weather patterns in California and across the country will play a crucial role in future supplies and quality as fall harvests roll on.



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