

The Source

Commodity of the Month - Asparagus



MARKET ALERTS

Asparagus - Easter demand drives prices up despite steady supplies from Caborca; expect a strong market on both coasts with good quality.

Avocado - Growers delay harvesting to boost pricing amid majority of fruit grown at higher elevations; short ripening times due to high dry matter.

Broccoli - Volume deals available as weekend approaches, but expect a potential shortage next week with rising temperatures.

Limes - Markets active as Easter approaches, with Mexican labor halted for holiday, prompting early harvesting.

Oranges - Markets active with Holy Week nearing; Mexican labor pause prompts early harvesting.

Green/Red Grapes - Demand for imported grapes exceeds supply; inconsistent arrivals keep market active until Mexican grape deal in mid-May.

Iceberg Lettuce - Limited availability persists; Yuma's production ongoing, Huron's starts next week. Increased weight reported, with some discoloration noted by multiple shippers.

Lettuce Leaf - High demand for romaine and leaf items; limited romaine hearts; fair quality with lighter weights, discoloration, mildew, and fringe burn.

MARCH 20, 2024

CROP UPDATES

The Huron region in Central California is starting harvesting romaine and iceberg supplies, acting as a bridge for supplies for 3-4 weeks until the Coastal California Valleys take over production in mid-April. Quality is good, with insect pressure expected. [Read more](#)

WEATHER

Arizona - Arizona is expected to experience showers, dry conditions, and warm temperatures through Friday, with lows in the mid-40s to low 50s, and a cooling trend starting on Saturday.

California - High pressure will persist through early Friday, with morning lows in the 30s to low 50s and daytime highs in the 60s to mid 70s. Light rain may occur.

Florida - Tuesday was cool and dry, with gradual warming on Wednesday and Thursday. Expect slightly cooler temperatures and wetter conditions on Friday and Saturday.

Mexico - Light showers may occur over the weekend, but most areas will experience dry weather. Warm temperatures through March 23rd remain consistent, with morning temperatures cooling into the upper 40s to 50s.

FREIGHT

The Salinas and Yuma growing regions are expected to overlap with Santa Maria, Oxnard, and the Central Valley, causing trucks to make multiple pickups in distant areas.



MARKET ALERTS

Cantaloupe - Strong demand tightens market; good fruit quality.

Honeydew - Tight market due to vessel delays and lower yields; increased demand.

Watermelon - Extremely tight market conditions with demand surpassing supply; domestic season delayed until end of March.

Onions - Limited Northwest onion supplies, high prices; expect decline as supplies increase.

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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 supplies between now and the new crop will be skinny.

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



Asparagus

ALERT

Easter demand is in full swing. Despite steady supplies coming out of Caborca, demand has inflated prices. On both coasts, expect this market to remain strong into next week. The quality is also good.

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



Avocados

ALERT

Due to the majority of fruit being grown at higher elevations right now, growers are holding off on harvesting and crossings to increase pricing. Due to the high dry matter, ripening times are short. Contracts for Quarter 2 are now available in CMS.

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



Bell Peppers

There is an adequate supply. We are past peak production in Sinaloa, so volume is light while we wait for the northern Sonoran growing regions to begin. Coachella will begin mid-April and reds will follow in May. In Florida, spring crops are starting to come on, some deals to be had, and the quality of the new crop fruit is better. Due to the high demand for colored bell peppers, Canada will make a very light start next week and then gradually increase its production to more consistent volumes by April.

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

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

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Berries (Blackberries)

There is still a limited amount of product coming out of Central Mexico. The Central Coast of California is just beginning to scratch the surface, but it will gradually build through mid-April. The Georgia season should begin after Easter. There have been sporadic rain events in the growing regions over the past few weeks. It is still unclear how this rain will affect quality. Fruit from CMEX is being transferred to California and Florida DCs. The traditional observance of Holy Week will likely have some negative effects on packing and truck crossings next week.

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



Berries (Blueberries)

This item has not changed much from last week. From Chile, Central Mexico, and Baja, we are seeing very good availability in all distribution areas. Small numbers of California fruit have been reported but higher temperatures will be necessary to fully begin the season in late March or early April. In Dover, FL, Peruvian and Chilean imports are the main products available. Fruit from CMEX is being transferred to California DCs. Next week, we expect that the traditional observance of Holy Week will have some negative impact on packing and truck crossings.

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



Berries (Raspberries)

In Central Mexico and Baja, production is on the rise going into the end of March. The organic raspberries are showing these production increases first, followed by conventional raspberries soon after. Fruit from CMEX is being transferred to California DCs. We do expect that the traditional Holy Week celebrations will have some negative impact on packing and truck crossings next week.

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



Berries (Strawberries)

As crop cycles are trending downward, McAllen, TX should see a sharp decline in production over the next few weeks. Due to market conditions and quality issues, some growers are finishing up early. Santa Maria and Oxnard are experiencing an increase in production. There has been very little demand, which has caused markets to remain flat. As we move into the Easter pull period, demand should improve. Late last week, growers experienced a big increase in production just as demand was very light. As a result, many shippers offered volume deals to maintain inventory rotation. Rain is expected in Dover, FL on Friday, which could mean that Florida's season ends early. The volume will begin to decline next week with a lot of soft fruit and bruised fruit being thrown down.

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

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

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Broccoli

ALERT

As the weekend approaches, temperatures are expected to rise. There are still volume deals available, but they may be short lived next week

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



Brussel Sprouts

This week, there are plenty of good quality Brussels sprouts available. This market is expected to remain steady over the weekend

Commodity/Region	Supply	Price	Quality
Mexico (December-August)	Steady	\$\$\$	Fair
Salinas, California (July-December)	Steady	\$\$\$	Fair



Carrots

There is a steady market for whole carrots. Currently, Imperial Valley is the main growing region. Size looks good. There will be no issues for the foreseeable future.

Commodity/Region	Supply	Price	Quality
Kern County, California (May-July) (October-February)	Light	\$\$\$	Good
Lake Park, Georgia (December - May)	Light	\$\$\$	Good
Imperial Valley (February - May)	Steady	\$\$\$	Excellent



Cauliflower

This week's cauliflower supply has remained consistent. Look for this market to remain steady as we approach the weekend.

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



Celery

Overall, this market is steady and will remain so throughout the week. All packs are available with large sizing having the best quantities available. Continue to shop in Oxnard/Santa Maria, there are the best prices in this region. Yuma is winding down its production. Most shippers continue to report above-average quality with only slight seeder reported.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Yuma, Arizona (December - April)	Light	\$\$\$	Good

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

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Citrus (Lemons)

The overall peak size is 140ct and larger. District 1 is the main growing region. Sizes 165ct and smaller are extremely tight.

Commodity/Region	Supply	Price	Quality
CA Desert/Yuma (October - February)	Steady	\$\$\$	Fair
San Joaquin Valley (October - May)	Light	\$\$\$	Good



Citrus (Limes)

ALERT

The markets are active again as holy week approaches. As we approach Easter, this will be the case. Due to the holiday, Mexican labor will not harvest for several days, so shippers will harvest ahead as much as possible. To ensure order coverage, PRO*ACT recommends staying ahead of inventories and sending orders with ample lead time. As it will take a few days for the pipeline to refill, expect markets to remain active post Easter.

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



Citrus (Oranges)

ALERT

As Holy Week approaches, markets are active again. We will see this as we get closer to Easter. Due to the holiday, Mexican labor won't harvest for several days, so shippers will harvest ahead as much as possible. In order to cover orders, PRO*ACT recommends staying ahead of inventories and sending orders with ample lead time. After Easter, markets will remain active as it will take a few days for the pipeline to refill.

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



Cucumber

As FL ramps up, markets are easing. The Honduran season is about to end. The volume out of Nogales has increased, and Sonora will be the next region, followed by Baja.

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



Eggplant

Since Florida has a very limited supply of eggplant, most of it comes from Mexico. Mexican supplies have been tight with good demand due to Lent. Overall, the quality has been good. We will see more availability by mid-April once FL spring crops start and the new crop out of Sonora.

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

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

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Garlic

Overall, garlic supplies are tight. The Argentinian garlic harvest in South America has been good in recent months. This will not fill the overall supply gap, however. 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. This week's incoming volumes will be better than last week's. A lack of consistency in vessel arrivals prevents a smooth flow of incoming product and keeps the market active. Despite brief periods of shortages, the empty pipeline and pre-committed program volume 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. This week's incoming volumes will be better than last week's. A lack of consistency in vessel arrivals prevents a smooth flow of incoming product and keeps the market active. Despite brief periods of shortages, the empty pipeline and pre-committed program volume 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

The weather in Mexico has improved, which has led to an increase in supplies. As the weekend approaches, the market is expected to remain steady.

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



Kale

Supplies and quality of kale are good heading into the weekend.

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

ALERT

This commodity continues to be available in limited quantities across the industry. Yuma's production will continue for another three to four weeks, and Huron's production will begin next week with moderate availability expected. Santa Maria will also have production this week. The second tier escalation on value-added items will continue throughout this week. There has been an increase in weight on the product ranging from 38 to 43 pounds. Santa Maria's weights are similar to Yuma's. Multiple shippers have reported pink discoloration and brown butts.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Light	\$\$\$	Fair
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Santa Maria, California (March-December)	Light	\$\$\$	Fair
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Yuma, Arizona (November-May)	Light	\$\$\$	Fair
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Lettuce Leaf

ALERT

Despite increased inventory levels with multiple shippers, demand for romaine and other leaf items continues to exceed supplies. The availability of romaine hearts will be limited throughout the week. On romaine products, all value-added items continue to escalate at the second tier. The green leaf items are on the first tier of escalation. Overall, the quality is fair. There have been reports of lighter weights and discoloration of the ribs of romaine and leaf items. Mildew has also been reported on the outer leaves, as well as fringe burn. Next week is expected to be the start of production in Huron.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Light	\$\$\$	Fair
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Yuma, Arizona (November-May)	Light	\$\$\$	Fair
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Lettuce Tender Leaf

This week, arugula and spinach supplies remain steady. This week's cilantro yields are lower due to quality issues and a shortage of supplies. This week's ideal growing weather should help cilantro supplies improve by next week.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Steady	\$\$\$	Fair
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Oxnard, California (Year Round)	Steady	\$\$\$	Good
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Yuma, Arizona (November-May)	Steady	\$\$\$	Fair
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Melon (Cantaloupe)

ALERT

Demand has increased creating a stronger market. Commodities are tight due to vessel delays, holidays, and additional retail promotions that move around the loading schedule. Fruit quality is 12-14%, with minimal scarring and solid quality. There are plants in the ground in Yuma, and growers are waiting for them to bloom. There is a peak on 9s and 12s.

Commodity/Region Supply Price Quality

Central America (December - May)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Melon (Honeydew)

ALERT

There is a tight market for Honeydew. Due to vessel delays and lower yields on Mexican fields, demand has increased. Peaking on 6s.

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



Melon (Watermelon)

ALERT

Market conditions are extremely tight, demand exceeds supply, and domestic season won't start until the end of March. The color is lighter and the sugar level is lower than during peak season.

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



Mushroom

Volumes are promotable and there is a great supply.

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



Onions

ALERT

There are limited supplies of Northwest onions left, and prices remain high. Limited supplies of Mexican and Texas grown products have entered the market. Supplies of Mexican-grown onions are crossing. Although the market has started high, expect it to decline as supplies ramp up.

Commodity/Region	Supply	Price	Quality
South Texas (July-April)	Light	\$\$\$	Good
Tri-Cities, Washington (July-April)	High	\$\$\$	Excellent
Eastern Oregon/Parma, ID (August-April)	Light	\$\$\$	Good
San Joaquin Valley (May-August)	Light	\$\$\$	Fair
Hatch, New Mexico (July-April)	Light	\$\$\$	Fair



Pears

It is expected that the Anjou market will remain tight until new crop Bartletts start in California around mid-July. 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

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

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Commodity Updates



Pineapples

Supply meets demand and growers are fulfilling their contracted business. Supply of 6ct crowned and 7/8ct crownless pineapples has been impacted by the Holiday pull. There is a high demand for pink pineapples. After the holiday, additional supplies will be available.

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

Stocks of 40 - 60 CT remain limited. There is a surplus of 80 to 120 CT. Burbanks receive a premium over Norkotahs.

Commodity/Region	Supply	Price	Quality
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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. Overlap between Sinaloa and Sonora contributes to good volumes. Spring crops are also coming on in FL, and there are some good deals to be had. Quality is generally good, but rain in Florida this week may slow production.

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



Stone Fruit

Domestic Kiwi is still shipping. The crop is showing its age at this late point in the season. Shippable domestic fruit is starting to decline in volume, causing the market 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 on both coasts in small quantities. Peach supplies are very light.

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

There is a steady supply. FL spring crops have started in a light way out of Ruskin/PALmetto area and more growers will come into play over the next few weeks. In the west, MX should continue to provide consistent volumes through May, barring adverse weather conditions. Sizes have come down a bit, but quality has been good.

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

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

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Weather Updates



CALIFORNIA

The region will remain under high pressure through early Friday, with morning lows in the upper 30s to low 50s and daytime highs in the upper 60s to mid 70s. There is a chance of light rain beginning Friday night and continuing through the weekend as low pressure approaches the region. Temperatures will max out in the mid 50s to low 60s, with rain totals under 1/4".



MEXICO

Although a few light showers are possible into the weekend, they will remain widely isolated and generally light, so most spots should see dry weather. The temperatures will remain warm through March 23rd with little change. Most fields will experience highs in the low 80s to low 90s through Saturday. Over the weekend, morning temperatures will cool into the upper 40s to upper 50s in most places.



FLORIDA

Tuesday was cool and dry. There was a gradual warming on Wednesday and Thursday with mostly dry weather. With the next system taking aim at our state on Friday and Saturday, we can expect slightly cooler temperatures and wetter conditions. There is a good chance that most of the area will receive 0.50" or more of rain on Friday, followed by isolated showers on Saturday.



ARIZONA

Showers are likely to continue in the high terrain of Arizona today, but dry conditions are expected elsewhere. As the low-pressure area dissipates and moves east, winds will shift southerly by Wednesday, and temperatures will warm through Friday. Tuesday morning lows will be in the mid 40s to low 50s, warming to the low-upper 50s by Saturday. By Thursday, temperatures will rise to the low-upper 80s in Imperial Valley, possibly reaching 90 in the late afternoon. Saturday marks the beginning of a cooling trend.

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



Crop Updates

As we begin the transition from the Southwestern Desert regions to Central California, the recent weather patterns have been conducive for growth rates of the various crops. The Huron region of Central California will begin harvesting this week with mostly romaine and some iceberg supplies available from select shippers in the region. This region acts as a bridge for supplies for approximately 3-4 weeks until the Coastal California Valleys (Oxnard, Santa Maria, Salinas) take over production around mid-April. Quality looks good in the Huron region with some insect pressure expected as temperatures warm up in the Central Valley.

The cool, wet weather in Central California did not delay many plantings in the Salinas Valley. By most accounts, plantings went in with little disruption. Some grower activities (weeding, fungicide and fertilizer applications etc.) have been delayed slightly due to rain and the wet ground. Cool temperatures have also slowed general growth rates this season as light Cole crop (broccoli, cauliflower) harvests continue. The warm, dry weather pattern lately has allowed crews to enter stands as well as improve overall growth rates. Quality is reported to be generally good as the first leafy green harvests are expected to begin late this month. These early harvests generally tend to have smaller head size along with lighter carton weights and head densities due to the winter growing conditions.

Quality in the desert regions continues to be a challenge as temperatures warm up and the season winds down. Insect populations are on the rise along with heat related defects including weak tip internal burn, twist/irregular shape and seeders, while also contributing to weaker, dehydrated texture and lesser overall shelf life. These late season supplies will continue to show some premature pinking along the rib that is not seen during harvest and tends to show up during transit and storage.

On the processing side extreme heat or cold can cause physiological changes in the plants causing leaf sensitivity and a weaker overall texture. This can result in increased mechanical damage and bruising during harvest and processing. Processed items will also likely see an increase in 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.



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