

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 20, 2023

CROP UPDATES

Coastal California growing regions, including Oxnard, Santa Maria, and the Salinas Valley, are entering fall production ahead of normal schedules. However, warmer temperatures and cooler weather patterns will likely lead to lower yields for many crops. Celery plantings in Oxnard are on schedule, while lettuce, romaine, and mixed lettuce are expected in the Huron region. Disease pressure in the Salinas Valley is increasing due to heavy spring rains and flooding, with fungicide sprays being used to combat mold, mildew, and disease. [Read more](#)

WEATHER

Arizona - As this week progresses, temperatures will gradually cool toward slightly below normal levels during the latter half. By Friday afternoon, temperatures should drop to mid-80s to mid-90s.

California - The morning lows will be in the upper 40s to upper 50s, while the daytime highs will be in the low-upper 60s near the coast. In Santa Clara Valley, maximum temperatures will be in the mid-70s to low 80s, while in southern Salinas Valley fields, temperatures will be in the upper 70s to mid-80s.

Florida - Through Wednesday, temperatures will be in the upper 80s to low 90s; on Thursday and Friday, they will be in the mid-80s to low 90s. Wednesday through Friday mornings will be mostly in the mid-60s to mid-70s.

Mexico - Expect primarily dry weather conditions as a whole through the weekend, with isolated showers possible.

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.



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
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Apples

Yakima, Washington (August-July)	Steady	\$\$\$	Good
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Commodity/Region	Supply	Price	Quality
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Berries (Blackberries)

California (Year Round)	Light	\$\$\$	Fair
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Asparagus

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



Berries (Blueberries)

ALERT

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



Avocados

Mexico (Year Round)	Light	\$\$\$	Good
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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
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Broccoli

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

Commodity/Region	Supply	Price	Quality
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Celery

Oxnard, California (Year Round)	Light	\$\$\$	Fair
Salinas, California (May-August)	Light	\$\$\$	Fair



Brussel Sprouts



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



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	\$\$\$	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)	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

Commodity/Region Supply Price Quality



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

Commodity Updates



Apples

New crops are now being packed in for most varieties. The quality and supply are excellent.



Asparagus

Asparagus production in the El Bajío region of central Mexico is all but finished at this point; very little production remains for 2023. In Southern Baja, Constitucion, asparagus production has transitioned and is expected to increase in the coming weeks, reaching peak production sometime around mid-October if the crowns react as predicted. This production is coming on as a result of cutting and preparation ahead of Hurricane Hilary several weeks back. This resulted in a lot of rain hitting the fields. There is good availability of supplies for the next 2-4 weeks. The majority of Peruvian asparagus comes from fields in the south located in the main growing areas of Ica, Canete, and Chi. There are still uncertainties here due to El Niño and the challenging weather year we have had. Although the south will continue steadily in the coming weeks, production should pick up once the weather warms up even more. Climate forecasts predict historically warmer temperatures and more rain in October and November than in previous years.



Avocados

The price for 60ct and larger sizes remains escalated. Flora Loca's current crop is wrapping up, followed by Adventajada's. Flora Loca is extremely limited on #2-grade fruit since the main grade is #1. As the size curve has shifted, 70ct/84ct sizes will be extremely tight for the next 2-3 weeks. To cover orders, alternate countries of origin and size exceptions will need to be flexible. The Adventajada crop is expected to have better availability in all sizes as well as a higher percentage of #2-grade fruit. Peru is winding down and is expected to finish within the next 2-3 weeks. For ripening and inventory planning, please send orders with as much lead time as possible.

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Commodity Updates



Bell Peppers

Markets are steady for now. As local deals wind down and we transition further south, we may see active markets. Harvest will begin in Georgia and Coachella next month. Red bells remain very limited and we may see a similar trend as last year when relief did not come in until Nogales got going in late December.



Berries (Blackberries)

The market is steady with light supplies available out of California, most shippers are covering contracts and previous commitments. There is very little open market fruit available until Central Mexico begins to produce in mid to late October crossing in through McAllen, Texas.



Berries (Blueberries)

There is a very short supply of this item. We are experiencing a market where demand exceeds supply. We expect better availability in 2 more weeks for import fruit coming out of Central Mexico, Peru, and Argentina.

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Commodity Updates



Out West, numbers are light but steady. Small numbers are beginning to show up out of this crossing from CMEX.



Production out of Salinas and Watsonville is on the decline while Santa Maria and Oxnard begin to build momentum with steadily increasing yields.



Broccoli crowns including florets are tightening up. Mexico's supplies have slightly improved. Overall, the quality is fair with in Salinas with some brown bead and pin rot. As we approach the weekend, this market is expected to go keep rising.

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Brussel Sprouts

The demand for Brussels sprouts continues to exceed the supply. Mexico's erratic weather continues to cause quality issues, resulting in a shortage of supplies. The market is expected to remain high and steady as the weekend approaches. Seeders and discoloration have caused low yields and smaller sizes in Salinas and Oxnard. I hope Salinas supplies pick up a bit by the end of the week. Supplies will remain tight until then.

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 steady. The fields have come forward in recent weeks, and now harvesters are right on top of their fields. As we approach the weekend, you can expect this market to stay steady.

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Celery

This commodity is forecast to have lighter supplies in Salinas as well as southern California for the week. A strain in production has been caused by INSV in some fields in Salinas. Orders are being filled much more in Oxnard and Santa Maria. Throughout the week, 36 counts will have the least availability. Southern California continues to offer the best prices. Throughout the week, pricing is expected to rise.



Citrus (Lemons)

As District 2 nears the end of its season, markets remain elevated across the board. The lemon market is tight across the board and will remain so until District 3 gets started. District 3 (California desert/Arizona) is expected to start shipping in early October. Offshore products are available on both coasts.



Citrus (Limes)

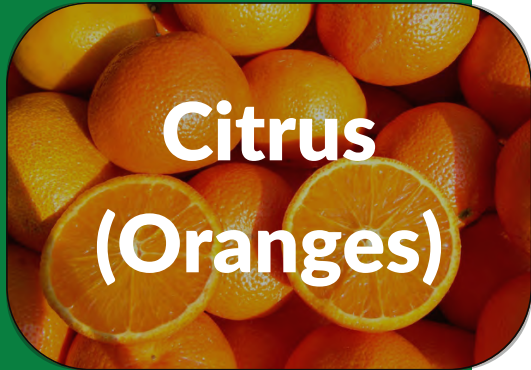
Prices are higher than last week. There are fewer crossings through South Texas, and low yields are persisting out of Mexico. Over the next few weeks, we will begin to see improved quality due to the new crop. The biggest FOBs for big fruit 110/150ct are still coming from older crops. However, due to low yields, they are the highest.

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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

GA has begun in a limited way and production will increase along with quality over the next three weeks. As we transition to Nogales in October, west coast volume will decline.



Eggplant

Out west, markets remain steady at elevated levels. We won't see much relief until Coachella starts next month. With local winding down, availability in the east is light to steady.

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Garlic

It is expected that California's production will remain steady throughout the week. There have been reports of good quality.



Grapes (Green)

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 tight and high.



Grapes (Red)

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 tight and high.

Commodity Updates



Green Onions

Due to Hurricane Hilary's heavy rains and the recent extreme heat in Mexicali, green onions are in short supply and of poor quality. This market will rise as supplies tighten. For the next three to four weeks, supplies are expected to remain tight.

Kale

The market remains steady. Throughout the week, availability is expected to be moderate to good. The market is stable and the quality is good.

Lettuce Iceberg

The market is active. There are fewer supplies available in the Salinas Valley as well as in southern California. This commodity's price is expected to gradually climb throughout the week. In both regions, weights range from 35 to 41 pounds. Defects such as puffiness and discoloration of the outer leaves are common. There are multiple reports of this from shippers. Multiple shippers will have lighter availability this week.

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There has been a shortage of romaine as well as green and red leaf lettuce. With this being said, shippers are expected to have enough production to fill all demand. There will be plenty of Romaine hearts available for all orders as well. There has been some fringe and tip burn reported, but the overall quality of all leaf items should remain above average. This week, promote romaine and all-leaf items as much as possible in anticipation of higher markets next week. Production continues in Salinas and Santa Maria.



This week's spring mix, tender greens, and spinach are slightly tighter due to the recent heat and warmer nights. It is hoped that the cooler nights ahead will improve quality and supply.



With sizing becoming more available, San Joaquin Valley cantaloupes remain excellent quality. Jumbos will become less available as the valley gets cooler. As back-to-school programs begin, supplies are tightened. The Yuma product is expected to be available starting on 10/16/2023.

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Commodity Updates



Melon (Honeydew)



While we transition to Yuma, some suppliers will finish shipping honeydew from the San Joaquin Valley within the next week or two. Smaller sizes (6/8) remain limited, but quality remains high.

Melon (Watermelon)



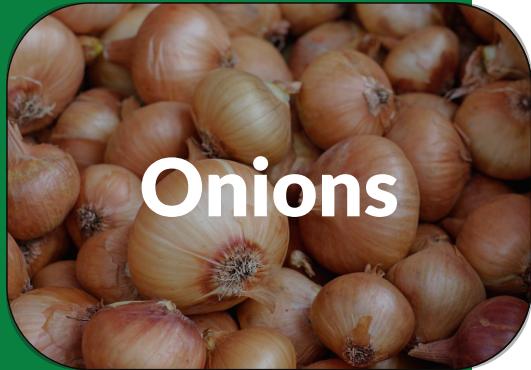
The supply of mini seedless watermelons is decreasing in California, and new supplies are expected to arrive next month from Mexico. As retailers transition from summer fruits to fall crops, quality remains high and demand is shifting.

Mushroom



There are excellent supplies and availability.

Commodity Updates



Onions

Abundant supplies of all sizes and colors of Northwest onions. The quality is excellent.



Pears

Beginning this week, Anjou and Bosc pears will be available in Washington. Bartlett's new crop is in full swing. California pear shippers are starting to pack the mountain district. Currently, Bartletts, Boscs, and Red pears are being shipped.



Pineapples

As a result of continued 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. This is expected to last over the next 3 weeks.

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Potatoes

There is an abundant supply of 50 - 100 CT potatoes available in Idaho. The quality remains excellent. The only variety available is Norkotahs.

Squash

Squash has started in newer regions of Georgia and North Carolina, so local deals are winding down fast. Once the local stuff wraps up expect lighter supplies due to GA crops affected by bloom drops from past storms. As Santa Maria continues to roll through the end of October, production will gradually increase in mainland Mexico.

Stone Fruit

The nectarine season is effectively over. There are a few pallets here and there, but nothing in volume. Peaches continue to be demand exceeds supply with most shippers finishing this month. Some will pack into October. Plums are mostly steady, with more blacks than reds available. Plums should be available until November. Pluots are winding down with some shippers and will be finished by the end of September. Asian pears will be available through December.

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Commodity Updates



Tomatoes

Overall, prices are firm. Both coasts have a steady supply.

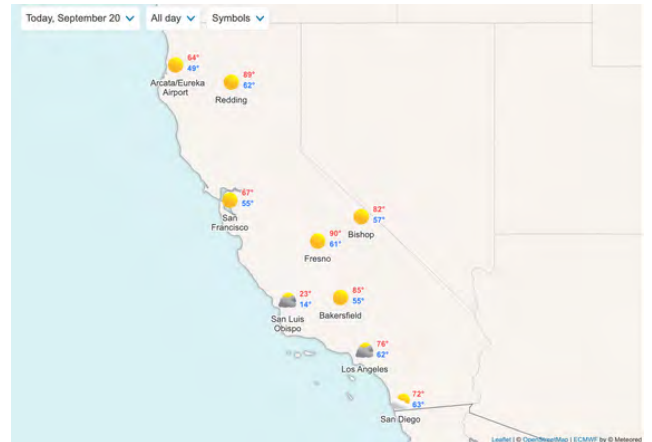
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Weather Updates



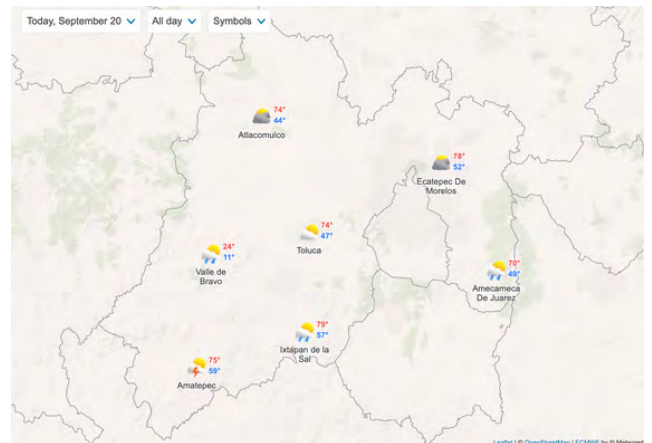
CALIFORNIA

Deep marine layer conditions, spotty drizzle, and below-average temperatures are being brought by a cut-off low stalled well offshore. The morning lows will be in the upper 40s to upper 50s, while the daytime highs will be in the low-upper 60s near the coast. In Santa Clara Valley, maximum temperatures will be in the mid-70s to low 80s, while in southern Salinas Valley fields, temperatures will be in the upper 70s to mid-80s.



MEXICO

Expect mostly dry weather conditions as a whole through the weekend, with isolated showers possible. Through Sep 23rd, temperatures should remain seasonably warm. Through Saturday, maximum temperatures should range from the mid-70s to the mid-80s. Over the region, temperatures will drop into the low 50s to the low 60s in the morning. Much of Central Mexico will experience gusts of 20 to 25 mph through Thursday.



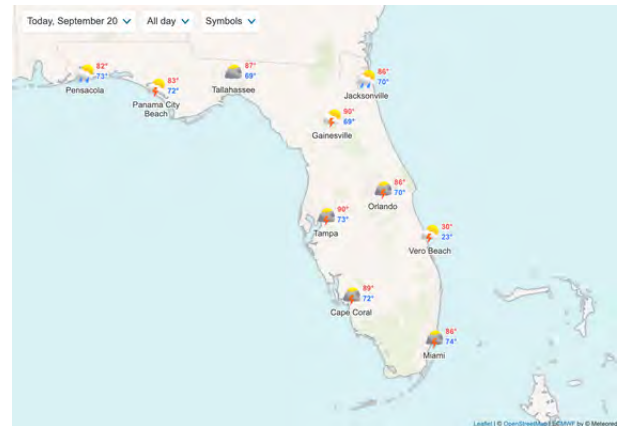
For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

Weather Updates



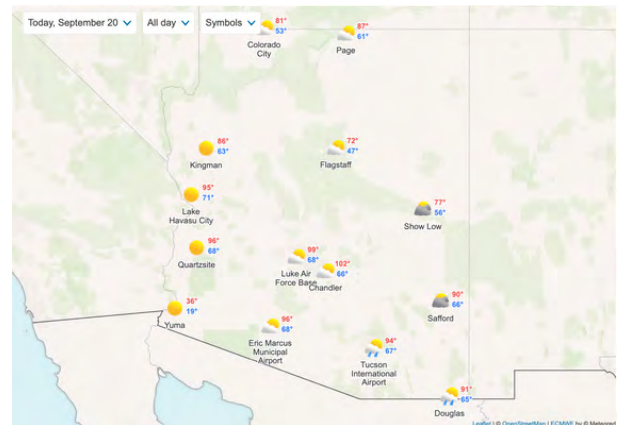
FLORIDA

Most of the southeast will remain under high pressure, but Florida will see a stalled frontal boundary. The latter half of this week may also see the development of an inverted trough. Through the end of the week, scattered showers and t-storms are likely to occur most days. There is a good chance of rain in areas south of I-4, but showers and t-storms are still possible. Through Wednesday, temperatures will be in the upper 80s to low 90s; on Thursday and Friday, they will be in the mid-80s to low 90s. Wednesday through Friday mornings will be mostly in the mid-60s to mid-70s. Through Sep 20, winds will gust near or below 20 mph over most of the forecast area.



ARIZONA

There will be very little chance of rain throughout the region for most of the week. As this week progresses, temperatures will gradually cool towards slightly below normal levels during the latter half. By Friday afternoon, temperatures should drop to mid-80s to mid-90s. By Friday morning, most fields will experience morning lows in the upper 50s to mid 60s.



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](#)

	09/04/23	09/11/23	09/18/23	Change from	
				week ago	year ago
U.S.	4.492	4.540	4.633	▲ 0.093	▼ -0.331
East Coast (PADD1)	4.474	4.479	4.537	▲ 0.058	▼ -0.352
New England (PADD1A)	4.467	4.478	4.587	▲ 0.109	▼ -0.424
Central Atlantic (PADD1B)	4.625	4.651	4.748	▲ 0.097	▼ -0.345
Lower Atlantic (PADD1C)	4.419	4.417	4.456	▲ 0.039	▼ -0.344
Midwest (PADD2)	4.383	4.427	4.492	▲ 0.065	▼ -0.503
Gulf Coast (PADD3)	4.171	4.212	4.352	▲ 0.140	▼ -0.338
Rocky Mountain (PADD4)	4.727	4.810	4.864	▲ 0.054	▼ -0.068
West Coast (PADD5)	5.390	5.535	5.695	▲ 0.160	▲ 0.083
West Coast less California	5.028	5.153	5.260	▲ 0.107	▲ 0.116
California	5.801	5.970	6.192	▲ 0.222	▲ 0.043

*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 this fall across these growing regions along with the coastal marine layer, especially for fields near the coast. Inland regions will continue to see hotter temperatures and warm overnight temperatures as we move into fall. Fall weather patterns of less daylight hours and cooler temperatures will typically bring lower yields for many crops. Celery plantings in the Oxnard region continue on schedule as growers report some fusarium issues in these early plantings. Cooler temperatures expected next week should help contain any big fusarium outbreaks. The Huron region continues on track with lettuce, romaine, and mixed lettuce expected around mid-October. 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 the early harvests 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 at this time.

In the Salinas Valley disease pressure is on the rise as growers harvest these late-season crops. Growers have been turning the ground over quickly this season attempting to play catch up from the late start due to the heavy spring rains and flooding. Growers are on their third crop rotation and the disease load is building in the soil. Much of the ground is showing the results of the quick turnaround which may affect yields in these fall fields. The warm, humid overnight conditions will continue to increase mold, mildew, and disease pressure including sclerotinia, fusarium, botrytis, and downy mildew which are caused by a soil-inhabiting fungus. The fungi can persist for long periods in the soil and is spread by wind or equipment in moist humid conditions. 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 the leafy greens at the moment. Insect pressure is also on the rise with the winter rains allowing for plenty of insect habitats and the increased insect populations. Some seeders along with fringe and tip burns are also being reported in some romaine and leaf supplies. Broccoli supplies are showing some beads discoloration along with a branchy crown. Broccoli yields are expected to be on the lighter side in the near term due to the effects of warm temperatures and humidity. The tender spring mix, spinach, and cilantro have also been impacted by the heat and warm, humid overnight temperatures with some discoloration and weaker texture currently 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 trying to stay ahead of any major outbreaks. As always upcoming weather patterns in California and across the country will play a crucial role in future supplies and quality as summer harvests roll on.



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