

Overview

Avocados remain firm and expected to stay at or above current pricing while hot peppers are still very active as transition from winter production to summer production begins. Overall, we are seeing volume pick back up, however there are still delays hampering steady movement. We are seeing more volume available on limes, and some relief on smaller sizes, as production seems to be slowly improving, however overall conditions of the market will continue to be extreme through the remainder April, particularly on large sized fruit. Tomato and squash markets seem to be stable and should remain that way over the next two weeks. Banana and pineapple volume continues to be steady through the ports and we are anticipating no issues through the weekend barring any unforeseen delays. We are still seeing active markets on cucumbers and bell pepper, and this will continue for the next 10-12 days as growers start picking newer fields and increase production. Corn market is split right now with higher priced product in the west and good volume being harvested out of Belle Glade Florida, we expect to see some new crop South Georgia products begin to be harvested over the next 12-14 days, we should see cabbage first then slowly roll into pepper, squash, and cucumber. Transition is complete and Taylor Farms will be shipping many items from Yuma as a result of the fire in their Salinas, CA plant. The Salinas/Watsonville region received rain on Wednesday night and is forecasted to rain today (Thursday) as well. We will keep you posted on any issues within those areas as a result of the precipitation.

Market Alert

- Avocados – **ESCALATED**
- Bell Pepper (Green) – **ESCALATED**
- Cantaloupes – **ESCALATED**
- Carrots (Jumbo) – **ESCALATED**
- Cucumbers – **ESCALATED**
- Garlic – **EXTREME**
- Ginger – **EXTREME**
- Honeydews – **ESCALATED**
- Hot Peppers - **ESCALATED**
- Limes – **EXTREME/FORCE MAJEURE**
- Mushrooms – **ESCALATED**
- Oranges (88's/Smaller) - **EXTREME**

WATCH LIST

- Green Beans
- Snow Peas
- Sugar Snap Peas

Transportation

DAT national load to truck ratio has returned to the levels we were seeing prior to the December/January spike with March 6th reporting a 10.94 load to truck ratio. This reduction in truck demand has also brought the average cost per mile reported by DAT back down from \$3.61 in January to \$3.47 as of March 10th. The \$3.47 average is the same average as December '21. The conflict in Ukraine has brought supply uncertainty to the crude oil market. This uncertainty along with sanctions on Russia has increased crude oil prices from \$86 per barrel in January to \$124/b in the first week of March. This increase in crude oil has caused the average diesel cost to increase from a \$3.72/gal average in January to \$4.84/gal average as of March 7th.

Weather

OXNARD, CA:

Thu 4/21	Fri 4/22	Sat 4/23	Sun 4/24	Mon 4/25	Tue 4/26	Wed 4/27	Thu 4/28
62° 52°F	62° 48°F	68° 52°F	76° 54°F	76° 54°F	72° 54°F	68° 52°F	66° 51°F
							
Mostly Sunny	Mostly	Sunny	Sunny	Mostly Sunny	Partly Cloudy	Sunny	Partly Cloudy

CULICAN, MX:

Thu 4/21	Fri 4/22	Sat 4/23	Sun 4/24	Mon 4/25	Tue 4/26	Wed 4/27	Thu 4/28
93° 62°F	91° 63°F	92° 61°F	94° 58°F	95° 58°F	97° 62°F	100° 64°F	100° 62°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny

IMMOKALEE, FL

Thu 4/21	Fri 4/22	Sat 4/23	Sun 4/24	Mon 4/25	Tue 4/26	Wed 4/27	Thu 4/28
87° 65°F	85° 65°F	89° 66°F	91° 66°F	90° 64°F	92° 65°F	91° 64°F	89° 63°F
							
Mostly Sunny	PM Showers	Mostly Sunny	Partly Cloudy	PM Showers	PM Showers	Mostly Sunny	PM Showers

JALISCO, MX:

Thu 4/21	Fri 4/22	Sat 4/23	Sun 4/24	Mon 4/25	Tue 4/26	Wed 4/27	Thu 4/28
85° 56°F	83° 54°F	82° 53°F	81° 53°F	82° 54°F	85° 60°F	85° 60°F	86° 58°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny

COACHELLA, CA:

Thu 4/21	Fri 4/22	Sat 4/23	Sun 4/24	Mon 4/25	Tue 4/26	Wed 4/27	Thu 4/28
90° 58°F	77° 54°F	87° 60°F	93° 63°F	97° 67°F	100° 65°F	99° 65°F	97° 63°F
							
Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy

SALINAS, CA

Thu 4/21	Fri 4/22	Sat 4/23	Sun 4/24	Mon 4/25	Tue 4/26	Wed 4/27	Thu 4/28
65° 51°F	62° 46°F	65° 46°F	71° 49°F	72° 48°F	68° 46°F	64° 46°F	64° 46°F
							
Showers	AM Light Rain	Partly Cloudy	Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny

Good Buys

Commodity	Market Update	Expert Tip
Florida Super Sweet Corn	Good volume available out of Florida this week, however, still anticipate a very bumpy ride until we transition to Georgia in May. Florida growers in the Belle Glade area are into newer blocks this week and seeing much better yields but still expect some loss over the next several weeks as they continue to hit patches of production that were affected by weather.	Did you know that corn is very good for your eye health and help prevent the lens damage that leads to cataracts? Corn contains vitamin B6, a nutrient necessary for maintaining healthy levels of pyridoxine. Pyridoxine deficiency can cause anemia and may increase the risk of developing heart disease, depression, and premenstrual syndrome. Since corn is naturally gluten-free, it is also a good choice to use in place of wheat.
Zucchini and Yellow Squash	Excellent supply and quality available out of Florida and Crossing through Nogales.	Roasting vegetables is a simple and easy side dish or entrée for any lunch or dinner. Slice zucchini and trim broccoli and place both onto a sheet pan. Then drizzle olive oil, and sprinkle with chopped garlic, salt, pepper, and a squeeze of lemon juice. Once roasted, sprinkle with parmesan cheese.
Broccoli Crowns	Quality is very good, with good supplies	

Fruits & Vegetables

Avocados: **ESCALATED** Texas Governor Abbott's border inspection program ended on Friday, and trucks have been able to cross again, but it was slow to get empty trucks in place for loading new fruit at the packhouses. The supply chain was severely disrupted and in addition, there is still increased demand to cover holiday lift which will keep pricing elevated into next week. Last week's total volumes for the U.S. closed at 33.1 million pounds, with 21 million pounds coming from Mexico. Standing inventories in the US are down to 41.1 million pounds and will be slow to build as fruit is going out just as quickly as it's arriving and it's going to take another 7-10 days to refill the pipeline. Once we're past Cinco de Mayo, May should bring back some stability and lower price points, barring any events.

Bananas: Availability is picking up and so is the quality. The weather is improving and the issues in Europe are increasing the supply as less fruit is being shipped there. However, we are seeing price increases this quarter due to skyrocketing fuel prices

Pineapples: Pineapple availability continues to be okay. The size profile is trending to size 5 and 6 cts and availability on 7 cts remains limited.

Grapes: Weather in Chile is ideal for grapes and has been for a few weeks, which is increasing the supply imported into the U.S. Red Grape pricing continues to be fairly low with plenty of supply. Green grapes remain higher as fewer supplies have been shipped.

Berries

Strawberries: Volume over the next two weeks will remain slightly lower than previously anticipated because of cooler temperatures combined with rainfall and heat. The crew continue to clean up sunburnt fruit and after these two weeks, we should see volume increase.

Blackberries: Peak supply is expected from central Mexico for the remaining weeks of April. This week's volume is light, but that was expected due to the holiday. Once we enter May, we'll transition between the central Mexico and USA regions.

Raspberries: Central Mexico and Baja continue to uptrend and reach their spring peak at the beginning of May and late May, respectively. Central Mexico will lose half of its peak volume by the beginning of June, while the other regions such as Oxnard, the North, and Santa Maria will reach their peak volume by June.

Blueberries: Central Mexico is producing large and decreasing volumes. Florida is on the back end of its season's peak, but Baja production is increasing toward its spring peak. Georgia started last week, and volume is expected to ramp up next week.

California

Citrus

Oranges: **EXTREME (88's/smaller)** Availability on small sizes have gotten extremely tight, with market pricing in the low to mid \$20s. Some shippers have started Valencias, but market price will remain high through May. Size structure is peaking 72/88/56, mostly fancy grade.

Lemons: Are in full swing, quality has been good.

Limes: **EXTREME/FORCE MAJEURE** Between the border strike interrupting supply, as well as a very volatile year for limes, and we still are seeing unprecedented conditions. As we have shared, the grower community expected improvement in supply by now, however, the new crop limes are simply not sizing up. Growers continue to cut ahead into the smaller fruit to keep the supply chain full and we hope to see some relief over the next 2-4 weeks as volume increases, and new regions start harvesting. We will continue to see challenges so please be flexible on sizes, consider scaling back on portions, removing temporarily, or even subbing to lime juice or fresh lemon where possible.

Grapefruit: Ruby grapefruit now available. Size is peaking on 32s and larger fancy and all small sizes 36s and smaller are tight. Texas is expected to start very late.

Imports/Specialties: Blood oranges are available in good supply. Murcotts / minneolas are available in good supply as well.

West Coast Lettuce

Butter Lettuce: Now shipping from Salinas, and quality is very good. Market is stronger.

Green Leaf: Now shipping from Salinas, quality is very good. Market is slightly higher.

Red Leaf: Now shipping from Salinas, quality is very good. Market is slightly higher.

Romaine and Romaine Hearts: Transition from Yuma to Salinas is complete, quality is very good with very good demand. Prices are steady to slightly stronger

Iceberg Lettuce: Transition from Yuma/Huron is complete. Quality is very good, market is steady.

Eastern and Western Vegetables

Green Bell Pepper: ESCALATED Production remains tight out of Florida and FOB prices were higher this week. We expect up and down markets over the next several weeks due to crop loss and bloom drop resulting from damages by the freeze early last month. We should see some relief over the next week as new crop will start to become available. In Mexico, there was cooler weather last week that will slow down production but expect the season to wind down over the next several weeks. Coachella is slowly ramping up and quality out of the region is very nice. In Mexico, quality varies by region in Mexico as well as what fields are being harvested, we are seeing much better quality in newer acreage.

Red Bell Pepper: We are turning the corner on volume and seeing lower prices in general. Overall quality in the west is good and fair in the east. We are starting to see a few growers begin to start out of Canada and expect good volume to increase over the next week. Peaking in XXL sizes this week and next.

Yellow Bell Pepper: Good volume and quality available crossing through Nogales. We are also seeing a few growers begin to start out of Canada and expect good volume to increase over the next week. Peaking in XXL sizes this week and next.

Mini Sweet Pepper: Supply is good loading in Nogales, as well as Canada, and quality is very nice.

Mixed Chili Pepper: ESCALATED We will continue to see marginal quality and light supply out of Florida due to the freeze and we will need to re-evaluate daily as losses are expected to be particularly high on chilies. We do expect improving availability once we transition to Central Florida in over the next two weeks. In McAllen and Nogales, prices remain firm this week, mainly due to a combination of the border delays and transition. We hope to see better volume over the next 2-3 weeks as newer regions ramp up production.

Eggplant: Good supply available out of Florida and Mexico. Georgia and Coachella are about 5 weeks from starting.

Slicer Cucumbers: ESCALATED Florida supply continues to ramp up over the next 10-14 days, while in the west we continue to see lighter crossing and higher demand from the east keep FOBs higher out of McAllen and Nogales.

English Cucumbers: Improving volume available out of Mexico and Canada.

Pickles: Supply was lighter this week crossing through Nogales and quality is very nice.

Green Beans: WATCH LIST This week, we continue to see a split market as volume out of Florida remains steady while very light volume out of the west. Mexican markets remain elevated due to last week's holiday and the lack of labor for harvesting. Quality has been improving with each harvest in Mexico. Mexican FOB prices are expected to remain elevated for the next few weeks.

French Beans: Excellent supply and quality out of Guatemala

Zucchini/Yellow Squash: Excellent supply and quality available out of Florida and Crossing through Nogales.

Herbs

Good availability and consistent supply on all herbs, except CHERVILL which continues to be limited.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	MEXICO
Opal Basil	Steady	Steady	MEXICO
Thai Basil	Steady	Steady	MEXICO
Bay Leaves	Steady	Steady	COLOMBIA
Chervil	Limited	Steady	USA
Chives	Steady	Steady	MEXICO
Cilantro	Steady	Steady	USA
Dill	Steady	Steady	MEXICO
Epazote	Steady	Steady	MEXICO
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	MEXICO
Mint	Steady	Steady	USA
Oregano	Limited	Steady	MEXICO
Italian Parsley	Steady	Steady	USA
Rosemary	Very Limited	Steady	MEXICO
Sage	Steady	Steady	MEXICO
Savory	Steady	Steady	USA
Sorrel	Steady	Steady	USA
Tarragon	Limited	Steady	MEXICO
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

Cantaloupe: ESCALATED Cantaloupe's production remains consistent with grower projections. However, they continue to face challenges with limited availability with ocean carriers which is not allowing them always to send their fruit to preferred destination ports. Recent sizing has been primarily 9cts and larger, with a considerable amount of jumbo fruit being packed. This trend has left 12/15cts in an extremely

limited position. The cause for this has been hotter temperatures in the growing areas. Melons are coming in with some of the best exterior color of the season, and we are seeing average brix levels increasing slightly.

Honeydew: ESCALATED Honeydew production is even shorter than the cantaloupe. Growers are harvesting mostly 5cts and larger leaving the 6/8cts in an extremely limited position. With lower overall production, the significant shift in sizing to larger fruit truly magnifies the shortage of the smaller sizes. Fortunately, incoming fruit has been very good quality with good brix levels.

Watermelon: Seedless watermelons (offshore crop) are rapidly winding down while steady production expected to continue out of Florida and quality is very nice. Good volume crossing through McAllen and Nogales on Minis and Seedless.

Mixed Vegetables

Artichokes: Quality has improved significantly, with good supply.

Arugula: Quality has improved with much better available supplies, market is steady

Asparagus: WATCH LIST The Caborca/San Luis region has all but wrapped up its season. Obregon has started with slow production, but we should see more volume in the next week or two. The Guanajuato region should start-up in mid to late May. Peruvian production increases every week, but a truck driver strike has slowed logistics. The market is very active with the transition from Caborca to Obregon and Peru's logistical challenges.

Broccoli/Broccoli Florets: Quality is very good, with good supply.

Brussels Sprouts: Quality is good with very good demand; market is slightly stronger.

Carrots: ESCALATED Current demand exceeds predicted supply while lower than average yields caused by cold wet weather has limited availability. Shippers continue to struggle with labor due to COVID and not having enough workers show daily to pack carrots.

Cauliflower: Supply continues lighter and will continue into next week.

Celery: Supply out of Oxnard is steady with a wide range in quality, market is slightly stronger. Salinas has not started yet but some shippers are transferring product to Salinas to load with mixers

Corn: Good volume available out of Florida this week, however, still anticipate a very bumpy ride until we transition to Georgia in May. Florida growers in the Belle Glade area are into newer blocks this week and seeing much better yields but still expect some loss over the next several weeks as they continue to hit patches of production that were affected by weather. In the west, Nogales is done and transition to Coachella and Imperial Valley are underway. Quality out of the desert is very nice.

Fennel: Supplies are lighter, quality is very good. Market is steady

Garlic: EXTREME Domestic supply is very tight, and shippers are holding to averages but we expect this volatile market to continue through next summer.

Ginger: EXTREME Ginger is very volatile due to very inconsistent supply and market is higher. Supply remains tight for the foreseeable future.

Green Cabbage: Steady availability continues out of Florida and Texas. In the west, weights are improving because of crop movement although we are seeing cone shape heads for this week. Georgia expected to ramp up this week.

Green Onions: Supply is good with very good quality, Market is steady

Jicama: Steady supply available crossing through McAllen.

Kale (Green): Supply is steady, quality is very good

Mushrooms: ESCALATED Quality is good, although supply is down and markets are higher primarily due to a lack of labor, shortages in component of growing such as peat moss and other inflationary pressure. We expect to see this continue to be a challenge until some of the growing costs can get under control of this particularly labor intensive and cost sensitive item.

Napa Cabbage: We are seeing decreased availability until we see supply increase out of Salinas.

Parsley (Curly, Italian): Parsley supplies are expected to be steady this week.

Rapini: Excellent supply this week and next.

Red Cabbage: Supply is good as quality remains consistent with sizing and overall appearance.

Snow Peas and Sugar Snaps: WATCH LIST We will see some challenges in the market as we transition to Salinas and Santa Maria. This will primarily be due to a decrease in supply from Guatemala as well as the Mexico season finishing which will put pressure on the Santa Maria and Salinas growing areas to take on all of the supply. Expect very active markets until Santa Maria and Salinas growing regions are in full production.

Spinach (Bunched & Baby): Supply and quality are good.

Spring Mix: Supply and quality are good.

Sweet Potatoes and Yams: Availability continues to be good out of North Carolina on jumbos, #1's and #2's. Volume has picked up the past few weeks in anticipation of the Easter holiday. The market has been relatively flat all season, but we should expect to see prices gradually start to climb as we enter the summer months.

Onions:

Product continues to be tight out of South Texas. With Mexico entirely out of the picture, and the Texas crop down to their last few weeks, availability has been very hit and miss on reds and whites. Yellows continue to peak around Jumbo size, with Mediums tightening up significantly as well. The Northwest

continues to ship their remaining storage supplies - primarily out of Washington. There remain only a handful of growers shipping in the Imperial Valley, California this week. Next week, just about all growers will begin shipping and we should see supply out of there dramatically increase. Red and white volumes have been slow to start out of this region but should also ramp up next week. While the early reports are that California has a plentiful crop of yellows and reds, it is believed there is a high presence of 'seeder' onions in this crop. If this is correct, and growers can grade these out, we could see their supply on #1 product be much lower than expected. However, if a lot of these 'seeder' onions make their way into bags for the fresh market, it could have an adverse impact on pricing overall. Typically, the Imperial Valley starts around May 1st, so we are certainly seeing them with a much earlier shipping period than normal. This should help to extend their crop and stretch it out a bit more, so the market does not get flooded and push pricing down below growing costs. Trucks have remained plentiful, and rates continue to reflect healthy capacity, with some reduced demand. However, we do expect the rates will take an increase as trucks begin moving to California for the Salinas transition.

Potatoes:

The potato market has stabilized on all sizes now. It appears to be a bit of a mixed profile depending on the different growers around the state. Some are in a larger size profile, whereas some are heavier to smaller potatoes. Overall, the market continues to remain relatively 'flat' in terms of pricing this month. However, we are beginning to see the market tighten on large size count cartons throughout the state. We are seeing smaller size profiles on potatoes than we previously had, which is helping to lower the FOBs on those items. Non-size A potatoes, and #2s are more plentiful than they have been in recent months as well. Growers are beginning to get into their last remaining Norkotah cellars and should finish them up over the course of the next month or two. Growers do see a decrease in production when switching from Norkotahs to Burbanks, as the Burbanks do not pack out with the same level of production than Norkotahs do. The concern this year is that the drop off will be significant as the Burbanks were believed to have taken the brunt of the heat wave this past summer. If that does take place, we will see a fast upturn in market pricing across all sizes and grades of potatoes. Processor demand remains heightened and continues to put pressure on the fresh crop as they are offering record prices for bulk product. Growers in all regions are preparing for a very strong April, where product is expected to significantly tighten up and remain snug until new crop in August. Additionally, freight has returned a much more 'normal' state for this time of year. We are seeing rates that we have not seen since early 2020, before the Pandemic. Despite hefty fuel increases, this has not materialized yet in higher rates. Rates are expected to increase in April as we move toward Summer.

TOMATOES

East Coast

- **Round and Roma Tomatoes:** While we are still harvesting out of Immokalee, we are not transitioning to the Ruskin/Palmetto area and seeing good harvest numbers. Currently peaking on large sizes due to crown picks.
- **Grape and Cherry Tomatoes:** Excellent volume and quality available
- **Organic Tomatoes:** Supply will be limited this week.

Mexico

- **Round and Roma Tomatoes:** Good volume continues with a wide range of quality available as Winter Production winds down and transition to Spring crops begin.
- **Grape Tomatoes:** Strong numbers continue out of all regions and quality is outstanding.
- **Medley Grape Tomatoes:** Strong numbers continue out of all regions and quality is outstanding.
- **Cherry Tomatoes:** Strong numbers continue out of all regions and quality is outstanding.

APPLES &

PEARS

Apples: West coast new crop apples are being packed; however small sizes remain tight. East coast apples are available as well. Market price remains firm on small fruit as local schools take most of the volume.

Pears: This year's pear crop was down significantly, with mostly larger fruit available. Growers are trying to drag out supply as best as possible until new crop starts next August.