

Weekly Market Review

June 28, 2024

Overview

Corn remains the item of the week out of the south with plenty of yellow and bi color corn and the quality is outstanding! South Georgia production continues to increase on several items, bell pepper and tomatoes are the shortest. We are in the middle of transition and should see improvements over the next 7 to 10 days. Hot peppers are still active with shishitos and serranos the most volatile for the next several weeks. Tomato markets have tightened up on both coasts and as the mature green program out of the desert is winding down, the valley is ramping up this week. Local deals out of the Carolinas, Arkansas and Alabama are ramping up, and Tennessee and North Carolina are about ten days out. In the west, steady supply crossing in McAllen and Otay this week on rounds while romas have tightened up, as Florida is mostly done for the season. Table grapes supply is good out of Mexico, and we should see domestic fruit next month. Supply out of the desert on melons has been fair and should go through the first week of July then transition to California. Losing 8 days of avocado harvest from Michoacán is very significant. Volumes in the U.S. are at a low, and with Mexico opening in stages it's going to take longer than expected to refill the supply chain. During the refill process, it's important to stay flexible on sizing and COO to assist in a swifter recovery back to regular preferred programs. Early July will remain volatile. Mid to late July, when Loca is on-hand in the U.S., and the other COOs continue to make significant contributions to the market, some summer stability will be achieved. Size curve will heavily favor smaller fruit and sizing down through the summer is recommended. Warmer weather in the Salinas Valley is continuing. While the early harvesting caused some issues with supplies, things are slowly improving. We are seeing good quality on most items and supply is improving on liner and romaine. The price is still escalated, but relief is on the horizon. When it comes to supply, the big concern this week is brussels sprouts and broccoli. Brussels sprouts are extremely tight and prorates should be expected, and broccoli has improved a bit from last week, but we are still seeing light supply from some sources and the price will remain escalated. While the warmer weather is helping, it will take some time to get back on track and we still have extreme markets on most commodities.

Alert









- Asparagus – **ESCALATED**
- Artichokes -**ESCALATED**
- Avocados – **EXTREME**
- Bell Pepper (All Colors) - **ESCALATED**
- Bok Choy – **ESCALATED**
- Broccoli Florets and Crowns - **ESCALATED**
- Cabbage, Red - **ESCALATED**
- Cilantro- **ESCALATED**
- French Beans – **EXTREME**
- Fennel, Anise - **ESCALATED**
- Green Beans – **ESCALATED**
- Hot Peppers (All Varieties) - **EXTREME**
- Limes – **ESCALATED**
- Lettuce (Iceberg Liner, Ctn Romaine Hearts, VA Iceberg, VA Romaine, VA Iceberg/Romaine Blends) – **ESCALATED**
- Napa – **ESCALATED**
- Lemons – **EXTREME ON SMALL SIZES**
- Parsley (Curly & Italian) - **ESCALATED**
- Snow Peas – **ESCALATED**
- Tomatoes- **ESCALATED**

Watch List









- Carrots – Jbo, Med & Cello
- Ginger
- Lettuce, Boston/Butter Lettuce, Better Burger
- Oranges
- Brussel Sprouts

Weather









SALINAS, CA

Thu 6/27	Fri 6/28	Sat 6/29	Sun 6/30	Mon 7/1	Tue 7/2	Wed 7/3	Thu 7/4
64° 53°F	63° 52°F	68° 54°F	71° 52°F	75° 55°F	76° 59°F	76° 58°F	77° 58°F
							
Partly Cloudy	AM Clouds/PM	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Sunny









OXNARD, CA

Thu 6/27	Fri 6/28	Sat 6/29	Sun 6/30	Mon 7/1	Tue 7/2	Wed 7/3	Thu 7/4
72° 59°F	72° 58°F	72° 60°F	78° 63°F	76° 62°F	75° 62°F	75° 63°F	75° 63°F
							
Partly Cloudy	Partly Cloudy	Mostly Sunny	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy









BAKERSFIELD, CA

Thu 6/27	Fri 6/28	Sat 6/29	Sun 6/30	Mon 7/1	Tue 7/2	Wed 7/3	Thu 7/4
99° 69°F	101° 69°F	103° 71°F	103° 74°F	103° 76°F	108° 79°F	110° 80°F	109° 79°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









JALISCO, NAYARIT

Thu 6/27	Fri 6/28	Sat 6/29	Sun 6/30	Mon 7/1	Tue 7/2	Wed 7/3	Thu 7/4
80° 67°F	76° 66°F	79° 67°F	81° 68°F	80° 68°F	77° 67°F	78° 66°F	79° 66°F
							
Mostly Cloudy	Scattered Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms









VIZCAINO, BAJA SUR

Thu 6/27	Fri 6/28	Sat 6/29	Sun 6/30	Mon 7/1	Tue 7/2	Wed 7/3	Thu 7/4
96° 65°F	97° 67°F	102° 70°F	102° 72°F	103° 72°F	101° 73°F	98° 73°F	101° 73°F
							
Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Mostly Sunny

LAKE PARK, GA

Thu 6/27	Fri 6/28	Sat 6/29	Sun 6/30	Mon 7/1	Tue 7/2	Wed 7/3	Thu 7/4
90° 75°F	90° 74°F	92° 75°F	89° 75°F	92° 75°F	93° 75°F	95° 75°F	97° 76°F
							
PM Thunderstorms	Scattered Thunderstorms	PM Thunderstorms	Scattered Thunderstorms	Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Partly Cloudy

HENDERSONVILLE, NC

Thu 6/27	Fri 6/28	Sat 6/29	Sun 6/30	Mon 7/1	Tue 7/2	Wed 7/3	Thu 7/4
82° 66°F	84° 70°F	84° 71°F	88° 69°F	85° 62°F	82° 65°F	88° 68°F	89° 69°F
							
AM Showers	PM Showers	Scattered Thunderstorms	PM Thunderstorms	Sunny	Partly Cloudy	Partly Cloudy	PM Thunderstorms

Fruits & Vegetables

Avocados: EXTREME Last week's harvest closed at 43M pounds, a 20% decrease from the previous week. With Mexico pulling in 10 Mil lbs. from Jalisco, the other countries of origin did some heavy lifting. Mexico only accounted for 24% of the market share last week, and with a soft opening it might take another week or 2 before becoming the leading COO again. Last week's Peruvian arrivals came in at 9M pounds, and this week the U.S. is expecting almost 12M pounds to arrive. Ocean transit time is 3-4 weeks so additional volumes ordered last week are likely just hitting the water now. Peak volumes will arrive will be arriving in 2 weeks and continue through late August when volumes will begin declining. Last week California closed at 19M pounds which is the largest harvest week in four years. With the market expected to stay high, as Mexico's recovery will be slow, the next few weeks will likely continue to exceed expectations. California's revised crop estimate calls for about 260M pounds for the season, 50M pounds over the original, and at the current pace this added volume will be eaten up quickly.

Bananas: Steady supply and quality remain good.

Pineapples: Steady supply and quality remain good. Sizing is going to be a challenge over the next few weeks and may need to be flexible on sizing as 5-6 ct fruit is very short with 7-8's plentiful. We expect to see the sizing distribution even out by the middle of July.

Table Grapes: Good supply available out of Mexico on all colors, but we are starting to see some quality issues arrive as the season winds down over the next 10 days. We do expect to see some fruit out of the desert and Arvin over the next two weeks. Quality is mixed out of Mexico, but we are starting to see some shatter, soft fruit, dried stems with shorter shelf life.

Berries

Strawberries: Supplies remain plentiful and are expected to remain plentiful for the foreseeable future. The weather this week has been mild and cloudy, with the sun coming out in the afternoons out of Watsonville. Daytime temps have been in the high 60's to 70's, and nighttime temps in the low 50's. Production is still on the incline and will continue to ramp up as we warm up for summer. We are in a peak for the next 3 weeks or so. Both methods have good sheen, large size, strong red color, and good flavor, but all growers are seeing misshapen fruit, bruising, and overripe fruit. The weather has been mildly warm in Santa Maria, with daytime temps in the high 70's to low 80's, and nights in the mid 50's. The fruit and plants look good, but as SM is winding down for the season production is reducing week-over-week. We are seeing issues of bruising, soft skin, and overripe fruit in the fields. Next week we have limited harvest on some days: Conventional will only harvest 3-4 days and Organics will have 4-5 days of harvest

Blackberries: Quality is good, with sizing between the medium to large range, nice sheen, mostly black and with good firmness out of Mexico. Due to high temps in the regions, we do see some regression in some ranches and some soft, leaking fruit as the days continue to be hot. Volume for blackberries is in a peak from Mexico. Watsonville production has begun and is looking good. Production will begin doubling about every week until the peak in September. The quality has been strong with nice black sheen but are seeing some calyx attached and maybe a leaker here and there.

Raspberries: The weather has been hot and sunny throughout all regions in Mexico but is cooler than last week. We are seeing temps in the mid 90's and nights in the mid 60's. Next week is looking to be similar, with daytime temps still in the mid 90's as well. Production for bushberries is back up to a sustainable peak, and between Mexico and California, growers should have plenty of supply. Overall, fruit is looking good with a strong red color, with some fruit with lighter in color in the pack due to picking a bit early ahead of the heat. Sizes are mostly medium with larger berries here and there. Growers do see some overripe and crumbled fruit sporadically throughout the packs, but crews are doing their best to keep them out of the packs. Volume for raspberries is in a peak from Mexico. Watsonville production has been steadily increasing and is looking great. Production will begin doubling about every week until the peak in late July to early August. The quality has been good with good color and flavor, but we are seeing some overripe fruit.

Blueberries: Growers are seeing some issues of shriveling, scarring, and deformities. Overall, the color, size, and flavor of the blueberries are good out of Mexico. Production is trending down due to the high heat. Conventional blues have sized up a bit and are 12-16 mm in general. Conventional wise, volume is expected to dip in late June through July and then start ramping up again towards September. Organic wise, volume has begun tapering off and has begun winding down for the season. Conventional production has reached peak volumes in the Central Valley but has begun dropping in volume as we get closer to entering July (expecting last week of June to end the season). Fruit is looking great with nice, big size. Seeing some soft fruit and red backs, but the packing house is doing a good job keeping them out of finished packs. Overall, the quality is looking good with nice size and flavor. Initial scratch pickings are scheduled to begin this weekend in the Pacific Northwest. Initial fruit sets look excellent but are slow to bloom due to low temps and foggy, rainy days. PNW is expected to hit large volume towards the middle of July. Conventional fruit includes regions from Oregon, Washington, and BC Canada. We are expecting BC fruit to come in around the 2nd or 3rd week of July. PNW organic fruit includes regions from Oregon and Washington. Organic fruit is slightly delayed and is expected to come in towards the beginning of July.

California Citrus

Oranges: WATCHLIST The Valencia season is underway with good quality. There are currently small size oranges available but as the summer progresses fruit will be sizing up and small oranges will become scarce again. In addition, many shippers are predicting a gap between the end of the Valencia season and the beginning of the Navel season this fall.

Lemons: EXTREME ON SMALL SIZES We continue to see small Lemons in California exceptionally short with no relief in sight until District 3 fruit gets started late in the summer. Import Lemons are arriving with small fruit available. **FLEXIBILITY ON SIZING AND LOADING AREAS WILL BE MANDATORY IN ORDER TO GET ORDERS FILLED ON ORDERS LOADING IN CALIFORNIA!**

Limes: ESCALATED Lime pricing has escalated along with demand in preparation for the 4th of July holiday. Parts of Mexico received much-needed rain last week, which curtailed harvesting and packing in most growing areas, which is limiting crossings this week. Over the past few months, overall lack of rain paired with high temperatures has impacted sizing and quality. With the recent rain, we will see slight improvement in sizing and quality starting in August.

Grapefruit: California Grapefruit is being packed in Riverside and the central valley.

Imports/Specialties: Domestic mandarins are finishing but imports are starting to arrive. Volume on import Lemons is increasing.

West Coast Lettuce

Iceberg: ESCALATED Lettuce supplies are improving across the board. We are seeing good quality and condition. Pricing has adjusted down and should continue to come down over the next few weeks.

Romaine, & Romaine Hearts: ESCALATED Romaine, and Romaine Heart production is continuing to improve. Weights and yields are looking good. Pricing on hearts is still escalated but is trending down.

Green Leaf and Red Leaf Production in the Salinas Valley is steady. Overall quality is very good with good movement.

Butter: WATCHLIST Production in Salinas Valley is steady. Overall quality is good.

Eastern and Western Vegetables

Green Bell Pepper: ESCALATED Lighter supply in the east and west has spiked the market and expect conditions to be the same for the next few weeks. Transition in both regions combined with weather related supply as well as quality issues have impacted supply until we can get into newer blocks. In the east is going to be the transition from South Georgia to North Carolina and Tennessee while in the west we expect the desert to wrap up this week with transition to the central valley. Markets will be in the \$30+ range on all sizes with possible pro-rates expected.

Color Bell Pepper: ESCALATED Lighter supply and fair quality will impact the market for the next ten days mostly due to the west coast being in the middle of their transition from the desert to the Central Valley. The heat has complicated this by impacting the tail end of the desert crop resulting in less supply on color pepper.

Mini Sweet Pepper: Supply will be hit and miss this week loading in Nogales.

Mixed Chili Pepper: ESCALATED Record low supplies and higher demand are pushing prices higher across the entire category. Overall, the Quality is fair, but we expect to see a large imbalance in supply over the next few weeks until new crop out of Baja, North Carolina and the central coast of California ramp up.

Eggplant: Good supply and quality available this week out of the desert and South Georgia.

Slicer Cucumbers: Steady supply available out of McAllen, South Georgia, and Florida. Baja is scratching. Overall quality is good.

English Cucumbers: Promotable volume crossing from Mexico; markets were firmer this week due to lighter supply of slicer cucumber. Quality is good.

Pickles: Lighter supply available out of Nogales and Quality is good.

Green Beans: ESCALATED Supply is lighter this week and quality hit and miss due to weather related pressure. We should see better supply in 2 weeks as we transition to newer growing regions

French Beans: EXTREME Due to extreme heat in Guatemala and either no rain in some growing regions or too much rain in others, the French bean supply will be limited to non-existent for at least two to three weeks. Field temperatures are at 20 degrees above normal while supply is at about 30% of normal this week with very elevated markets. Next week, supply is looking to be 5-10% of normal at best.

Zucchini/Yellow Squash: Excellent supply out of South Georgia and California. We will need to watch the west coast as they are experiencing a heat wave that could impact supply over the next several days, and overall quality is good.

Herbs

Basil's quality is good. Dill's supply has slightly decreased. Chervil production has returned to its usual level.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Marginal	USA
Basil	Steady	Steady	USA/MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	USA/MEX
Dill	Steady	Steady	USA/MEX

Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

Cantaloupe: We are winding down out of the desert and transitioning to California (Firebaugh) production scheduled to begin by Monday 7/1. As we close out our Yuma program last fields are producing primarily larger fruit (9Js) which is going to leave smaller sizes in a shorter position. We hope once we get into second/final cuts on Thursday a better spread of sizing will be realized. Flexibility of sizing may be required at time of loading. Quality is at optimum levels right now with sizing, color and flavor all peaking. Once we move to California sizing should stabilize to more of a 9/12 profile initially.

Honeydew: Honeydews have become extremely short with desert production being mostly 5/5Js with little to no 6/8s. Mexican crossings have also dropped since last week, as they transition to new areas, which was providing most of the smaller fruit the past month. Flexibility of sizing may be required at time of loading, and expect honeydews to remain fairly limited over the next two weeks.

Watermelon: Good supply available as new crop is being harvested out of North and Central Florida as well as Mexico. Overall, the quality is good.

Mixed Vegetables

Artichokes: ESCALATED Overall supplies are still light. Quality is good.

Arugula: Supplies are good with very good quality.

Asparagus: ESCALATED Obregon/Southern Baja production has slowed down due to heat in the fields. Guanajuato has been slow to start due to lack of rain and heat. Washington, Michigan and Canada production are all but done for the season. Peruvian volume is down due to cooler temperatures in the northern growing region of Trujillo. White asparagus continues to be out until mid-July. Large sizes will also be difficult to come by for the next few weeks. Warm weather in both Mexico and Peru is causing smaller sizing

Bok Choy: ESCALATED Supplies are improving, and quality is good. The market is active.

Broccoli/Broccoli Crowns: ESCALATED Overall quality is good, but volumes have decreased drastically. Expect short supplies for at least the next 2 weeks and increased pricing.

Broccolini and Sweet Baby Broccoli: Salinas is showing good quality and supplies are steady/.

Brussels Sprouts: Demand is outpacing available supply, and the market will continue to advance. Supplies in the VA category may see some shortages driven by quality issues and whole spouts will see heavy prorates. This shortage will continue through the first week of July and then we should see some relief.

Carrots: (JUMBOS, MEDIUMS and CELLOS): WATCHLIST - Steady supplies continue with good Quality. Shippers still have light volume out of California, but volume is improving.

Cauliflower: Industry supplies are great, and quality and color are very good.

Celery: All production is now in Salinas. The quality is very good, and supplies are steady.

Cilantro: ESCALATED The market is active and supplies remain tight due to field challenges such as burn, mildew and spotting.

Corn: Good supply available out of South Georgia and the Central Valley. Quality is outstanding

Fennel: ESCALATED The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve.

Garlic: The 2023-2024 California Garlic will come to an end, prior to the new crop being ready for harvest. Look for subs to Mexican product during transition, starting approximately June 1st. Quality is good.

Ginger: Supplies and market are steady

Green Cabbage: Supplies are steady with very good Quality. Demand is good.

Green Onions: With the warmer weather trend, we are seeing very good quality and supplies.

Mushrooms: Stable supply and good Quality available.

Napa Cabbage: ESCALATED We continue to see some quality issues, but we should see an improvement over the next few weeks. Quality and supplies are improving.

Parsley: ESCALATED (Curly, Italian): Supplies are improving quality is fair.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light into July.

Red Cabbage: ESCALATED Pricing is escalated, and quality is good although supplies continue to be tight. Market remains very active

Spinach: Supplies are good with very good quality.

Spring Mix: Supplies are good with very good quality.

Snow Peas and Sugar Snaps: ESCALATED Guatemala production of snow peas and sugar snaps is almost non-existent due to weather issues the past 4-6 weeks. Peruvian snow peas are available in Miami. Markets are very active on all peas. Out of the west, snows continue to be very limited and sugar snaps supply is steady.

Onions: ESCALATED

The onion market is weakening fast on yellows. Between the influx of supply in New Mexico and Central California, as well as the constant crossing of Mexican onions, there is a situation where supply is exceeding demand on yellow onions. We anticipate this situation will stay sloppy on the supply side until the beginning/middle of July. At that point, a lot of the Mexican product, and the remnants of previous deals (Brawley, Washington) will be cleaned up which should help to shore up the surplus of supply. Reds have remained elevated, and while there are volume deals taking place in California due to extreme heat, and in order to move yellows, they appear they will stay fairly strong until the Northwest. Whites had gotten very cheap over the last several weeks, and we are starting to see a lot of those get cleaned up. We should see those rebound and potentially tighten up in the coming weeks as well. There are reports that the Northwest planted more acreage than last year, and pending weather conditions, may have a large crop that will start as early as late July. If that should happen, the market will have a hard time crawling out of wherever the price points are when the Northwest enters. Trucks continue to remain plentiful, and we have not seen any type of rate spike this week.

Potatoes:

The market continues to feel stable on all sizes and grades for the moment. We continue to see 40ct/50ct and now even 60ct remaining tight. They are available in mixer quantities, but heavy volumes do not seem to be available at the moment. Smaller size potatoes continue to remain plentiful and challenging to move. There is really not much further for the market to fall here, as growers are at the point where it would not make any financial sense to pack them at all at lower pricing levels. While relief was widely expected for this coming year, nobody thought the FOBs would be quite as low as they currently are. At this point, there does not seem to be a scenario where the market turns around any time before the Summer. Even then, supply will have to dwindle enough in June/July to allow FOBs to firm up, and quality will need to be strong enough to hold as well. The positive news is that quality is strong throughout the state, and there should be no shortage of available product in all sizes and grades. In fact, there will likely be an overlap of this year's current crop into next year so next year could unfortunately be a tough year on grower returns as well. Trucks seem to remain plentiful at the moment.

Tomatoes: East Coast – ESCALATED

- **Round Tomatoes:** Markets have firmed up due to transition from Florida and South Georgia to the local regions in the Carolinas, Tennessee, Arkansas and Virginia. We expect to see active markets through July 4th.
- **Roma Tomatoes:** Markets have firmed up due to transition from Florida and South Georgia to the local regions in the Carolinas, Tennessee, Arkansas and Virginia. We expect to see active markets through July 4th.
- **Grape Tomatoes:** Light supply expected for 2-3 weeks due to transition
- **Cherry Tomatoes:** Light supply expected for 2-3 weeks due to transition

Tomatoes: Mexico - ESCALATED

- **Round and Roma Tomatoes:** Good supply and quality available out of Jalisco and Baja but rain this week could impact Southern Mexico causing delays in harvesting. We will need to watch the outcome of the tropical weather impacting Central and Southern Mexico this weekend. Expect to see higher demand and upward pressure on price as demand will increase from the east as the local transition is underway. This will put upward pressure on FOB prices
- **Grape Tomatoes:** Lighter supply available as Sinaloa is done for the season and Baja is slow to start. We will also see higher demand from the east as the local transition is underway. Expect firmer markets through July 4th.
- **Cherry Tomatoes:** Steady supply and good quality available crossing through McAllen and Nogales.
- **Medley Grape Tomatoes:** Good supply available this week quality is good.
- **Tomato on the Vine:** Steady volume available this week.

California Tomatoes - WATCHLIST

- Mature greens out of the desert will be winding down and transitioning to the Central Valley this week. We could see some weather-related pressure on the crop as heat is expected to impact the region for the next several days with highs over 100 degrees.

APPLES

Apples: Washington State Apple Crop continues to produce good supplies and good quality products. The Core Varieties, Reds, Golds, Galas, Fujis, Gr Smiths, and Honeys, will make it to a new crop. Galas are down 600,000 boxes from last year, but the state still shows availability that will likely last for the new crop.

Pears: The crop appears to be 5 weeks from being finished for the Season. The Bosc Crop is finished for the Season, and Red Anjous should be done in the next 4 weeks. Northwest Bartlett Crop should start around August 8th, leaving us about a 2-week gap between old Anjous and New Crop Barts. The Wenatchee Valley Pear crop was devastated due to freezing temps in February. The Yakima Valley and Hood River Growing Regions were hurt but not nearly as badly as Wenatchee. Bottom line – Pear crop will be extremely tight the entire '24/'25 season.

Other Fruit

- California stone fruit now in production and cherries are winding down. And will transition to the PNW.
- Apricots now available
- California table grapes should start in the desert in early next month.
- Georgia is ramping up in Peach production