

Weekly Market Review

June 14, 2024

Overview

Corn is 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, but squash will remain the shortest due to weather related pressure. We expect to see tight markets in the region and on the west coast for the next ten days. Hot peppers remain very short with tomatillos, shishitos and serranos all being the most volatile for the next several weeks. Tomato markets have tightened up a bit on both coasts; new crop out of the California desert on mature greens have ramped up and lighter supply on romas this week crossing from Baja. Steady supply crossing in McAllen this week on rounds; Florida spring production is rapidly declining on rounds and snacking tomatoes while romas will be short this week. Table grapes are finally easing back as more production becomes available out of Mexico. We should see domestic fruit next month. The offshore melon season is done, and we have transitioned to the desert where supply is lighter this week but anticipate better supply next week. The Mexican market has experienced a recent tightening due to a decrease in supply and an increase in field prices. This trend is anticipated to persist through July as the current Aventajada crop season ends. The upcoming Flor Loca crop from Mexico is projected to gradually increase in volume starting in the latter part of June, primarily consisting of smaller sizes. Shipments from Peru and Colombia are helping to offset the supply shortage from Mexico. Meanwhile, California is at its peak production, but prices and demand have risen due to the constrained market conditions. Shippers are particularly focused on sizing; as summer approaches, most crops are peaking in smaller sizes. Guatemala's temperatures remain very warm. Some regions, mainly where French beans are grown, have started to see rain that has affected production. The weather in the Salinas Valley continues to hold acreage back. The industry continues to harvest early to meet demand which is reflected in the limited supplies. Ground temperatures are below normal, and crops are just not growing. As a result, we still have extreme markets on most commodities. Unfortunately, it seems that this weather trend will be following us into June.

Alert









- Asparagus – **ESCALATED**
- Artichokes -**ESCALATED**
- Avocados – **ESCALATED**
- Bok Choy – **ESCALATED**
- Broccoli Florets and Crowns - **ESCALATED**
- Cabbage, Red - **ESCALATED**
- Cantaloupe- **ESCALATED**
- Celery – **ESCALATED**
- Cilantro- **ESCALATED**
- French Beans – **ESCALATED**
- Hot Peppers (All Varieties)- **EXTREME**
- Limes – **ESCALATED ON LARGE SIZES**
- Lettuce - (**Iceberg Liner, Ctn Romaine, Ctn Romaine Hearts, VA Iceberg, VA Romaine, VA Iceberg/Romaine Blends**) – **ESCALATED**
- Napa – **ESCALATED**
- Oranges – **EXTREME ON SMALL SIZES**
- Lemons – **EXTREME ON SMALL SIZES**
- Parsley (Curly & Italian) - **ESCALATED**
- Snow Peas – **ESCALATED**
- Soft Squash (Yellow and Green) - **ESCALATED**
 - Lettuce, Boston/Butter Lettuce, Better Burger
 - Lettuce, Green Leaf and Red Leaf
 - Spinach

Watch List









- Carrots – Jbo, Med & Cello
- Ginger
- Green Beans

Weather









SALINAS, CA

Thu 6/13	Fri 6/14	Sat 6/15	Sun 6/16	Mon 6/17	Tue 6/18	Wed 6/19	Thu 6/20
63° 51°F	68° 51°F	68° 49°F	65° 49°F	67° 47°F	68° 47°F	70° 53°F	72° 54°F
							
AM Clouds/PM	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy









OXNARD, CA

Thu 6/13	Fri 6/14	Sat 6/15	Sun 6/16	Mon 6/17	Tue 6/18	Wed 6/19	Thu 6/20
67° 58°F	69° 59°F	73° 60°F	70° 58°F	70° 57°F	70° 58°F	70° 59°F	73° 61°F
							
AM Fog/PM	Partly Cloudy	Partly Cloudy	Sunny	Partly Cloudy	Sunny	Sunny	Sunny









COACHELLA, CA

Thu 6/13 108° 79°F  Sunny	Fri 6/14 113° 78°F  Sunny	Sat 6/15 113° 76°F  Sunny	Sun 6/16 108° 72°F  Sunny	Mon 6/17 103° 69°F  Sunny	Tue 6/18 101° 72°F  Sunny	Wed 6/19 104° 76°F  Sunny	Thu 6/20 109° 80°F  Sunny
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JALISCO, NAYARIT

Thu 6/13 83° 67°F  AM Showers	Fri 6/14 84° 67°F  Partly Cloudy	Sat 6/15 83° 67°F  Mostly Cloudy	Sun 6/16 84° 66°F  Partly Cloudy	Mon 6/17 82° 66°F  Partly Cloudy	Tue 6/18 79° 66°F  Partly Cloudy	Wed 6/19 81° 66°F  Partly Cloudy	Thu 6/20 81° 67°F  Isolated Thunderstorms
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VIZCAINO, BAJA SUR

Thu 6/13 109° 66°F  Partly Cloudy	Fri 6/14 104° 62°F  Sunny	Sat 6/15 102° 66°F  Sunny	Sun 6/16 101° 63°F  Sunny	Mon 6/17 99° 60°F  Sunny	Tue 6/18 95° 59°F  Sunny	Wed 6/19 97° 62°F  Sunny	Thu 6/20 101° 68°F  Sunny
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LAKE PARK, GA

Thu 6/13 95° 71°F  Sunny	Fri 6/14 96° 71°F  Sunny	Sat 6/15 99° 74°F  Mostly Sunny	Sun 6/16 98° 73°F  Mostly Sunny	Mon 6/17 95° 72°F  Partly Cloudy	Tue 6/18 94° 72°F  Partly Cloudy	Wed 6/19 94° 72°F  Partly Cloudy	Thu 6/20 94° 72°F  Partly Cloudy
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Fruits & Vegetables

Avocados: ESCALATED 32.9M pounds were shipped to the U.S. out of Mexico. The quality is good, and supply is tight as the industry nears the end of the season. The dry matter continues to increase in Michoacán, with the Aventajada Crop averaging dry matter levels of 39%. With high dry matter, fruit color is expected to be dark, but this is not an indicator of ripeness. Out of California, 15.2M pounds were harvested for week 23, and the total harvest to date is reported at 156.1M pounds. The CA crop's dry matter is averaging 29%. California volumes are expected to peak through June as growers try to support the overall short supply. The overall sizing curve from all three COOs is peaking on the 60 counts and smaller.

Bananas: Lighter supply and higher demand have tightened up inventories at many ports this week. Quality remains good.

Pineapples: Steady supply and quality remain good.

Table Grapes: Grape availability is slowly improving as more Mexican fruit crosses the border. Quality is mixed on the offshore fruit that is lingering and excellent in Mexico.

Berries

Strawberries: Supplies remain plentiful and are expected to remain plentiful for the foreseeable future. Daytime temps in Watsonville are in the high 60s, and nighttime temps are in the low 50s. Production is still on the incline and will continue to ramp up production as we warm up for summer—we are approaching an earlier-than-estimated peak as we enter June. Both conventional and organic have a good sheen, large size, strong red color, and good flavor, but all growers are seeing misshapen fruit, bruising, and overripe fruit. Temperatures in Santa Maria are a bit cooler this week, with daytime temps in the mid 70's and nights in the low 50's. The fruit and plants look good, but short-day varieties are switching to freezer. Growers are seeing issues of bruising and overripe fruit in the fields. Growers have not seen labor issues in either growing region.

Blackberries: Quality is good, with sizing between the medium to large range, a nice sheen, mostly black, and good firmness. Due to high temperatures in the regions, we see some regression in some ranches and some soft, leaking fruit as the days continue to be hot. Volume has started to increase again as another minor peak is coming in mid-June. Watsonville production has begun and is looking good. Production will start doubling about every week until the peak in September. Quality has been strong with a nice black sheen, but growers are seeing some calyx attached and maybe a leaker here and there.

Raspberries: The weather has slightly cooled down, and daytime temperatures in Mexico are now in the high 80s. Production of bush berries is picking up after a slump of about a month. There will be an abundant supply of berries between Mexico and California. The fruit appears to be in good condition, displaying a strong red color, although some berries are lighter due to early picking before the heat. Most berries are medium-sized, with a few larger ones scattered throughout. We 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 is on the rise again as a minor peak is expected in mid-June. Watsonville production has begun and is looking good. Production will begin doubling about every week until the peak in late July to early August. The quality has been good.

Blueberries: Growers are seeing some issues of shriveling, scarring, and deformities. Overall, the blueberries' color, size, and flavor are good. Production is down due to the high heat. Conventional blues have sized up a bit. Conventional volumes will begin to dip in late June through July and then start ramping up again towards September. The Central Valley production has reached peak volumes for the next couple weeks and will begin decreasing week over week when we enter July. The fruit looks great with a 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. Growers are expecting a heatwave next week, which may impact production. Overall, the quality looks good, and the size and flavor are nice. Conventional blues will peak in mid-June. Georgia has finished for the season. The Pacific Northwest is expected to start sometime this summer.

California Citrus

Oranges: EXTREME ON MEDIUM AND SMALL SIZES No Changes this week on the orange crop from California. The Valencia season is underway, as the Navel season continues to wind down. Small size oranges, including Valencia's, continue to be in extremely short supply and will remain in short supply until the Navel crop gets started in the fall. **FLEXIBILITY ON SIZING AND LOADING AREAS WILL BE MANDATORY IN ORDER TO GET ORDERS FILLED!**

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 starting to arrive in a small way 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 ON LARGE SIZES Lime market is strengthening on all sizes as supplies are decreasing from Mexico. Quality is also becoming a struggle as the lack of rain is impacting growing conditions. Expect pricing to continue to strengthen with as large sizes remain in extremely short supply.

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

Imports/Specialties: Cara Cara's are wrapping up for the season. Domestic mandarins and Gold Nugget Mandarins are available Pummelo's are available in the central valley of California. Volume on import Lemons is increasing.

West Coast Lettuce

Iceberg: ESCALATED Lettuce supplies are steady this week, but forecast is for supplies to be lighter into next week. With good quality and condition. Pricing has adjusted down but expect pricing to stabilize next week.

Romaine, & Romaine Hearts: ESCALATED Romaine, and Romaine Heart production is improving with very good quality. Pricing on hearts is still escalated.

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: Lighter supply available across all sizes and quality is good out of all locations.

Color Bell Pepper: Lighter supply and good quality available on all sizes.

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

Mixed Chili Pepper: EXTREME 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 3-5 weeks. Once some of the newer growing areas begin production, we hope to see some relief, however in the meantime we will continue to see the potential for shorts and extreme escalation in pricing. In Mexico, the main growing regions in Sinaloa are done and Cadereyta is slowly ramping up. South Georgia is steady and the west coast (California and the Baja will start in 4 weeks.

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: WATCHLIST Supply is lighter this week and quality hit and miss due to weather related pressure.

French Beans: ESCALATED Production has slowed due to rain in the Guatemalan growing regions and lack of rain in other regions. This may also affect quality and shelf life. Out of the west, steady supply and improved quality of French beans.

Zucchini/Yellow Squash: ESCALATED Recently we have seen availability on soft squash become very short. This is all due to weather-related pressure impacting the current crop in South Georgia, combined with Mexico finishing early, and the transition to California being very slow to start. We are seeing some pro-rates on our program business with our grower partners and expect this to gradually improve over the next 7 to 10 day

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: ESCALATED Very good cantaloupe demand continues with limited production forecasted over the next ten days. We anticipate a decrease in daily pack-outs by the end of this week which will remain lower through next week. The region has started to experience hotter temperatures which is conducive to providing better sizing. We are seeing a few more 9s the past two days but still too many 12/15s being packed which is negatively impacting yields. Quality from what we have seen has been very good with strong netting, good color and solid internal quality with brix levels now maintaining a 12-15% range.

Honeydew: New production will begin later this week. We are expecting primarily smaller sizing (6/8s) initially until we get a good week into production. Flexibility of sizing may be required at time of loading. Mexican honeydew crossings on larger fruit (5/6s) ceased last Tuesday which has pushed markets to higher levels.

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 continues to improve. Washington, Michigan, and Canada's production continues to be good. We should soon start to see these three regions slowing down due to seasonality. Peruvian volume remains unchanged from last week. Markets continue to be sluggish to do multiple regions in production. White asparagus remains very limited to non-existent from Peru, likely until July.

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

Broccoli/Broccoli Crowns: ESCALATED Overall quality is good, but volumes are decreasing as we head into next week. Market is strengthening with higher pricing anticipated.

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

Brussels Sprouts: S Sprout demand remains good but open market pricing is slowly advancing. Supplies for the VA category may see some shortages driven by quality issues. Insect damage is becoming more significant; elongated seed stem still remains a challenge.

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: ESCALATED Industry supplies are increasing with very good quality. Contract pricing remains escalated although market is adjusting lower.

Celery: ESCALATED Supplies continue to increase as the Salinas season gets ramped up and overall quality improves. Pricing is still escalated although the overall market has adjusted slightly. Expect steady supplies.

Cilantro: ESCALATED Cilantro supplies are steady; quality is improving although market remains very active.

Corn: Good supply available out of South Georgia, and Coachella. Quality is outstanding

Fennel: Market is steady. Quality and supplies are good.

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: We continue to see better supplies out of Mexico, with very good quality.

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 will be limited for the next few weeks, quality is fair.

Rapini: Quality is good, supplies continue light. Market is strong with supplies continuing light through next week.

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

Spinach WATCHLIST Supplies are good with very good quality.

Spring Mix: Supplies are good with very good quality.

Snow Peas and Sugar Snaps: ESCALATED Guatemala is experiencing low snow pea production due to high temperatures and insufficient rainfall. However, sugar snap production is good. The demand for snow peas remains high, while Peruvian peas are now entering the market. Snow peas from the west are still scarce, but sugar snap pea supplies are consistent.

Onions: ESCALATED

Red onions remain short, leading to higher market prices. We are optimistic that late June will bring some relief. With low inventory levels, growers will need to sell their produce at lower prices to reduce the FOB prices. Texas is finished for the season. New Mexico is close to peak production.

Potatoes:

There are no significant changes or obstacles anticipated. The market is projected to remain relatively stable. In May, we anticipate a slight increase in Burbanks and a decrease in Norkotahs. By the end of the month, all growers should have completed harvesting Norkotahs and transitioned exclusively to Burbanks until the new crop of Norkotahs is harvested in August.

Tomatoes: East Coast

- **Round Tomatoes:** Markets were tighter this week as Florida production starts to wind down for the season. Quality remains fair at best and peaking on larger sizes. We expect to see more local regions start harvesting; South Georgia and South Carolina are now in full production.
- **Roma Tomatoes:** Market remains firm despite steady supply. Overall, the quality is good.
- **Grape Tomatoes:** Excellent supply and Quality available
- **Cherry Tomatoes:** Excellent supply and Quality available

Tomatoes: Mexico

- **Round Tomatoes:** Good supply and quality available out of Jalisco and Baja
- **Roma Tomatoes:** Lighter supply and quality available out of Jalisco and Baja
- **Grape Tomatoes:** Steady supply and good Quality available crossing through McAllen and Nogales.
- **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

- Seeing mature greens out of the desert available this week and Valley fruit should scratch soon

APPLES

Apples: Washington State Apples remain in good promotable volumes on most varieties. Quality has been very good and is expected to remain good for the foreseeable future. Sizing is trending toward smaller sizes, 100s and smaller. Gala apples are seeing roughly one million fewer packages than last year.

Pears: Availability is down on Anjou, and Bartlett is expected to see a rise in markets over the coming weeks.

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 June.
- Georgia is ramping up in Peach production