

Mar 6, 2019

# the source



## Weather Update

A series of storm systems move into California with winds, rain, and cooler temperatures through the week. The Southwestern Desert regions will see a chance of rain, strong winds and cooler temperatures as these storm systems pass to the north. Cold air behind these systems will likely bring light lettuce ice to the region over the weekend. Seasonal to above average temperatures look to continue across Mexico through the week into next. In Florida, cold air behind an exiting storm system will bring much cooler temperatures following the recent warm temperatures across the state.

## Market Alerts

- Apples:** Granny and Golden apples continue to be lacking in availability. Chilean imported Galas set to arrive in 2-3 weeks.
- Bell Peppers (Eastern):** Supplies are getting very tight, quality is only fair.
- Berries (Strawberries):** Rain in California, diminishing supplies in both Florida and Mexico
- Cauliflower:** Cauliflower yields continue to be extremely short. Recent cold weather has caused the slow growth process and quality issues.
- Citrus (Limes):** Less inbounds coming from Mexico, and rain in the growing regions with high demand has driven prices up this week. Active prices across the board on all sizes.
- Cucumbers (Eastern):** Cucumber supply will be light for the next two weeks as the Honduran deal winds down.
- Eggplant (Eastern):** Very light supplies in Florida, poor quality.
- Onions:** Demand active in Northwest region. Markets are on the rise.
- Potatoes:** Russet 60 count and larger limited out of Idaho
- Squash (Eastern):** Cooler weather this week will slow squash production.



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# Freight Information



## Truckin' Along

California and Yuma trucks remain plentiful again this week. Washington apple trucks are plentiful as well. Idaho potato and onion trucks remain steady. The national average on diesel rose slightly again this week and is currently at 3.076 per gallon. California prices remained steady this week and are now at 3.779 per gallon. Crude oil prices increased slightly as well and are currently at 56.25 per barrel.

U.S. On-Highway Diesel Fuel Prices\* (dollars per gallon)

[full history](#)

				Change from	
	02/18/19	02/25/19	03/04/19	week ago	year ago
U.S.	3.006	3.048	3.076	↑ 0.028	↑ 0.084
East Coast (PADD1)	3.073	3.094	3.119	↑ 0.025	↑ 0.073
New England (PADD1A)	3.165	3.171	3.177	↑ 0.006	↑ 0.051
Central Atlantic (PADD1B)	3.256	3.286	3.301	↑ 0.015	↑ 0.061
Lower Atlantic (PADD1C)	2.927	2.949	2.985	↑ 0.036	↑ 0.091
Midwest (PADD2)	2.904	2.969	3.014	↑ 0.045	↑ 0.094
Gulf Coast (PADD3)	2.809	2.849	2.870	↑ 0.021	↑ 0.077
Rocky Mountain (PADD4)	2.887	2.913	2.939	↑ 0.026	↑ 0.029
West Coast (PADD5)	3.458	3.493	3.503	↑ 0.010	↑ 0.111
West Coast less California	3.104	3.141	3.155	↑ 0.014	↑ 0.091
California	3.739	3.772	3.779	↑ 0.007	↑ 0.127

## A Peek at Peak Seasons

**Berries (Strawberries):** Mexico and Florida are moving out of peak production. California should be producing good numbers barring further adverse weather by the end of March if not sooner.

## Transitions & Temperatures

**Berries (Blueberries):** Florida production has begun and numbers should improve in the next few weeks.

**Berries (Strawberries):** Strawberries will be fully Californian by the end of March according to most estimates. Salinas and Watsonville areas may be on-line as soon as the first week of April in a light way.

**Grapes (Green):** Import season will likely finish mid to late April and we will transition into Mexican and Domestic production.

**Grapes (Red):** Export season is expected to last another 4-5 weeks. We will transition into Mexican and Domestic product late April.

**Lettuce Iceberg:** Huron will begin production approximately the third week in March.

**Lettuce Leaf:** Huron will begin production approximately late in March.





# Commodity Updates



## APPLES

### Washington:

Northwestern apple market remains steady overall with moderate demand. On reds, we are seeing prices firm up due to decreasing volumes from regional suppliers. Volumes are beginning to slowly shift to the west, but markets remain steady at this time. Foodservice sizes on Granny and Golden remain scarce; shippers are filling 'mixer-load' quantities for the foreseeable future. Overall quality remains strong.

### East Coast:

As previously mentioned, some regional growing areas (North Carolina, Virginia, and Pennsylvania) are slowly dropping off in production and that demand is heading west. We will see this trend continue in the coming weeks as more shippers decrease production. Demand is light to moderate and quality continues to make good arrivals.

## ASPARAGUS

We are starting to see better volume come out of Caborca as weather conditions have improved with warmer nights that has helped fields yield better volume. Volume is still lower compared to last year but we expected to see a good increase in volume by the weekend. Markets continue to be steady to start the week, but we should see a slight decrease by the end of the week.

## AVOCADO (CALIFORNIA)

### California-

Last year the California crop total was just under 300 million pounds. This year's crop is estimated at 165 million pounds. California harvest is expected to remain slow for the month of March due to weather. We have been hit with heavy rain that has been forecasted throughout the month of March. This will delay and decrease harvest volumes while the fruit is sizing up. Due to the current rain, we can expect "Lenticel" damage to the fruit. This damage is only cosmetic and does not penetrate the skin. Lenticel scarring will become less apparent as the fruit ripens. Generally, early season fruit takes longer to ripen and skin remains green when ripe. Color is not an indication of ripeness. The most reliable way to determine ripeness is through touch. Keep in mind California season typically runs through August. With the

light volume expected this year, it could wrap up in June or July.

Peru also starts up in June and goes into September. Last year Peru shipped 179 million pounds into the US. This year the crop is estimated to be 6-10% smaller than last year.

## AVOCADO (MEXICAN)

### Mexico- "Aventajada" Crop

Mexico has been shipping and harvesting numbers that are significantly higher than projected. GREEN fruit this late in the season will appear with dark green skin. The most reliable way to indicate the stage of the fruit is by touch. This late in the season you will get the best-tasting fruit as it has a higher dry matter but also has a slightly shorter shelf life. The concern is that if growers do not slow down the harvest/shipments between now and the end of the season (June), the industry will see less fruit from Mexico. Shipments into California are currently up 40%. Pharr and Laredo Texas are up just under 5%. The "Flora Loca" crop will start up in July and runs into September. The industry will not see any significant volume on the "Loca" crop until early to mid-August.

## BELL PEPPERS (EASTERN)

Green Bell Pepper supply is very tight and will get even tighter as the week goes on. The Mexican pepper supply is very light and shippers are reporting an early end to their season. Florida shippers are winding down on their winter crop and the spring crop will not start until mid-April. Quality is only fair, growers are working on older fields and the peppers are showing some pitting and discoloration. We expect bell pepper to be escalated for most of March with very tight supply.



# Commodity Updates



## BELL PEPPERS (WESTERN)

**Green Bell Pepper-** Light volume on green bell pepper arriving in Nogales this week. Currently, low volume is being harvested in Sinaloa and Sonora. Quality on green bells from both regions is good. Supplies exceed demand on green bells. Market on Green bells is high on #1 and choice grade pack. Green bell pepper from Mexico is also available to load in McAllen, TX.

**Red Bell Pepper-** light volume of Red Bell pepper continue to be available to load in Nogales, AZ from Mexico. The price on the red bell pepper has increased this week along with the market. Light volume on both Elongated and Hot House bells in all pack styles. Low numbers on both varieties of red bells are expected through the week. Quality of red bell on both varieties is good. Red bell supplies from Mexico currently crossing through Nogales, AZ and McAllen, TX.

**Yellow Bell Pepper-** light volume of Yellow Bell pepper continue to arrive in Nogales this week. Both elongated and Hot House varieties being pack in 11lb/15lb and 1 1/9 bushel carton. Quality on both varieties is good. Currently, supply meets demand. Market on yellow bell is steady. Yellow Hot House bells are also available to load in McAllen, TX.



## BERRIES (BLACKBERRIES)

Blackberries remain steady with good supplies still coming out of Baja and Central Mexico. Quality has been good with the occasional red cell defect being reported. This defect is only cosmetic in general unless it has caused cell rupture in the fruit bead itself which leads to breakdown and leakers. The market is stable with the only shortages reported as temporary due to late transfer trucks from Mexico at the cooler level.



## BERRIES (BLUEBERRIES)

Blueberries are in good supplies and the market is steady with overall good quality. The majority of the fruit is still coming from Chile and Central Mexico. There is also some smaller microclimate production coming out of Central California. Florida production has just started and the harvest yields should begin to rise in the coming weeks. The Florida

fruit is priced slightly higher than the imported berries due to higher domestic production costs and purported superior quality. Look for the market to remain steady with lower undertones. Chilean imports will phase out in approximately two weeks.



## BERRIES (RASPBERRIES)

Raspberries will continue to be a steady go coming out of Baja Mexico and Central Mexico. Late transfer trucks have been causing temporary shortages at the shipping points but overall quantities are good. The market remains steady with slightly higher undertones. Quality has been good.



## BERRIES (STRAWBERRIES)

Strawberries are still in light supplies overall in all growing areas.

**California:** The Santa Maria and Oxnard areas are experiencing more rain this week and harvest will be short. We are expecting heavy rain overnight and then more sporadically through Sunday. Long range forecasts are modeling next week to be clear after Sunday with slightly higher day time temperatures as we move forward in the week which is exactly what the doctor ordered in regards to quality and quantities. Most shippers still feel that we will be in short supplies for the remainder of the month out of the area but if the good weather prevails we should see numbers increase prior to that. Quality is surprisingly good at this point as shippers have kept the harvests tight and the fields well stripped of juicing berries. White shoulders and overly firm fruit are a couple of issues we may come across in the next few days and going into next week. markets should remain Firm into next week

**Mexico:** Mexican production is definitely coming to an end in the next few weeks as we see less and less numbers of quality fruit able to be crossed into the US and meet specs. The quality of what is being offered is fair but with limited shelf life. Market should remain fairly firm but lower than California with the occasional deal being made for some older fruit coming available.



# Commodity Updates



**Florida:** After a huge harvest two weeks ago shippers are telling us that we are in a sharp diminishing return on harvest efforts. The season should last through March but the numbers being harvested are reduced drastically as the plants move into the final stages of their harvest cycles. This aging and eventual increasing temperatures will bring an end of the season by April. As with Mexico the prices are firm but markedly lower than the California fruit. Quality is just fair.



## BROCCOLI

The broccoli market continues to get tighter from the colder and wet weather we've recently experienced. Weather looks to be warm the next few days in Yuma and Mexico to help spur growth. Look for supplies to get a little better with the improved weather. Quality is good with slight purpling, some mechanical damage, and occasional yellow cast.



## BRUSSELS SPROUTS

The Brussels Sprout market continues to remain snug with supply being affected by the recent rains in Salinas and Oxnard. The quality has been affected by the rain and cold weather and sizing tend to run smaller due to this recent colder weather. Look for the Brussels Sprout market to remain tight going into next week.



## CARROTS

The carrot market continues to remain steady. The quality is good, and supplies are adequate to meet current demand. We see no change in the carrot market going into next week.



## CAULIFLOWER

Cauliflower continues to be extremely short as we are in a demand exceeds situation. The market continues to get stronger as suppliers are battling lower yields. The Yuma weather has been cooler resulting in a slower growth process. Overall, the quality is good with minor bruising and yellow cast with weights in the 25 to 28-pound level. Look for this market to continue to be tight going into next week.



## CELERY

Demand continues to exceed supplies with this commodity. This market continues to be very active in the marketplace. Escalated pricing on value-added product will continue throughout the week. Second tier escalators are in effect. Rains continue to hit the southern California region and damage the celery production. Supplies are light in Yuma and Mexico has helped out to fill demand. The poor weather has altered the growth of this commodity. Common defects reported from suppliers include bowing, pith, leafy tops, and insect damage. The quality is fair. Light availability will continue as long as the rain stays in the growing regions.



## CHILI PEPPERS

**Jalapenos-** Better supply of Jalapeno than last week available to load in Nogales, AZ from Mexico. Growers continue to harvesting jalapeno out of the Sonora and in Northern/Southern Sinaloa. Quality out of Sonora is good. Quality out of Sinaloa is good. Mostly medium to large size available from both growing regions. Market on jalapeno has started to decrease and should continue to decrease minimally as we end the week. Jalapenos from Mexico also available to load in McAllen, Texas.

**Pasilla-** Good supply of Pasilla available to load in Nogales, AZ from Mexico. Good volume continues to be seen this week and should continue through next week. Quality on Pasilla is good. Size on the pepper currently ranges from medium to extra large. Market on Pasilla is currently steady. Price on Pasilla pepper is expected to decrease moving towards the end of this week. Pasilla crossing through Nogales is being harvested in the Mexican states of Sinaloa. Quality from Sinaloa is good. Pasilla from Mexico also available to load in McAllen, Texas

**Anaheim-** Moderate supply of Anaheim continues to be available to load in Nogales, AZ from Mexico. Lighter Anaheim production expected through next week. Anaheim crossing through Nogales is currently being harvested in the Mexican states of Sinaloa. Quality of peppers from Sinaloa is good with mostly large size being packed. Market on Anaheim is slightly higher. Anaheim from Mexico also available to load in McAllen, Texas





# Commodity Updates



**Serrano** – Moderate supplies of Serrano peppers continue to be available to load in Nogales, from Mexico. Supplies expected to remain moderate. The demand slightly decreasing. Price on Serrano pepper also decreasing on a 40lb box and #10lb Pack and is expected to remain steady through the week. Light supplies of Serrano also crossing into McAllen, Texas.

**Tomatillo** – Husk and Peeled tomatillos are available to load in Nogales, from Mexico. Good supplies on both varieties expected to continue through the week. The tomatillo market is steady. Prices remain steady in the low teens. Quality on both varieties is currently good. Both varieties of tomatillos are also available to load in McAllen, TX.



## CILANTRO

The Cilantro market has started to pick up in Yuma and Mexico. The cilantro quality is fair and has been affected a bit by the colder weather at the beginning of January. Look for the cilantro market to continue to get tighter going into next week.



## CITRUS (LEMONS)

District 3 (Coachella/Mecca/Yuma) is extremely limited and looking to conclude next week. District 1&2 (Central Valley & Southern California Coastal Region) is coming along nicely and peaking on 75ct/95ct/115ct. Even with the amount of rain we've had it hasn't had too much of an effect on supplies. However, the smaller size fruit 140's and smaller are looking to tighten up for the next couple months. The rain and cold weather brought on the larger fruit and smaller fruit is staying limited on sizing and green on the trees. Current markets are looking steady, normal business on small fruit looks steady for now but could get snug with the upcoming rain.



## CITRUS (LIMES)

The market seems to be very active this week and is expected to continue on a weekly basis. Inbounds from Mexico have been very light and demand has increased. Peak sizes remain to be 200's & 230's. Industry-wide, we should expect 110's & 150's to be light on supplies. Reports from Mexico are that March will be a very short month on quantities. We are advising customers to avoid running lime ads for March due to unpredictable quantity and lack of commitments from the growers. Organics are very tight right now and will remain so through March.



## CITRUS (ORANGES)

Navels are starting off the week with steady supplies, most suppliers are doing their best to pack ahead to get in front of the next storm. The Central Valley is expecting rain Tuesday through Friday and depending on the amount of rain could affect delays with harvest. We will continue to monitor the rain and communicate harvest plans and availability. Size structure continues to lean toward more 88/113/72 fruit. The small fruit supplies are starting to dwindle a bit, but there is still more to come. Most suppliers are holding off promotable opportunities until they build inventory supplies. We encourage orders to be placed at least 48 hours in advance to help allocate orders. On Specialty Citrus we still have plenty of Delite Mandarins that are peaking on 32/28/24 followed by size 36. Plenty of Pummelos available sizing and quality look great. Cara Caras & Blood are moving along, steady supplies are available. Golden Nugget Mandarins Ojai Pixie Tangerines have started but will be very limited to start due to weather permitting, please reach out for pricing.



## CUCUMBERS (EASTERN)

Cucumber supply is tight as supplies from Honduras are winding down for the season. Most shippers will finish for the season in a week to 10 days, a couple will go through March with lighter volume. Florida growers are late planting because of wet weather when they were preparing fields. Some Growers will start late next week on light volume but most will not start until the first of April. Quality is still pretty good on most product, number 1 product is harder to come by as pack outs are heavier to selects.



## CUCUMBERS (WESTERN)

Light supplies of cucumber being harvested in Sonora, Mexico. Quality out of the Sonora district is mostly fair. Light supplies of cucumbers also being harvested in the Mexican State of Sinaloa this week. Supplies have decrease as growers are transitioning to new fields. Mostly plain and small sizes available in 1/9 bushel pack this week along with 24ct and 36ct pack. Few Super, Select, and large size are also available. The cucumber market has stabilized and is expected to remain steady for the remainder of the week. Quality out of Sinaloa is good.



# Commodity Updates



## EGGPLANT (EASTERN)

Eggplant supply is very light in Florida just as it has been for the past month. Growers are working on much reduced acreage for the winter months that have been through some rough windy weather. Quality has been marginal at best, with a lot of scaring due to heavy winds Florida gets every winter. There is some new acreage about to start but this week is forecast for some of the coolest weather Florida has had all winter with temperatures dipping down into the low 40's. This will delay any volume until late next week, some shippers are supplementing with Mexican product.



## EGGPLANT (WESTERN)

Eggplant- Eggplant continues to be harvested in the Mexican State of Sinaloa. Good supplies of eggplant currently being harvested and have increased this week due to good weather in the growing region. Both fancy and choice grade currently being packed. Current market on eggplant has decreased minimally and is expected to remain steady through next week. Quality from Sinaloa on fancy and choice pack is mostly fair to good.



## GRAPE (GREEN)

Green grape supplies have finally reached a consistent state. Over the last 2 weeks, availability has gradually improved. This week, with the arrival of more vessels from Chile and Peru, shippers are expecting good supplies of sizes large to extra large. Medium sized green grapes are still limited but are becoming available. Quality is being reported as very strong. There are several varieties available. Demand has been strong. Markets have been steady and shippers have been trying to keep it elevated, but with the expectation of more fruit arriving, we will see prices start to decline. I expect to see more aggressive prices and promotional opportunities by next week. Supplies will remain consistent moving forward as we finish the import season. We will see harvest start to transition into Mexico and Coachella by mid to late April.



## GRAPE (RED)

It feels like we have finally turned the corner on the import grape supply situation. Over the last 2 weeks, we have seen the red grape supplies slowly increase as more vessels arrive from Chile and Peru. This week, the pipeline has filled and we are seeing an overflow of fruit start to penetrate the markets. Sizes range between medium to extra large. Quality is being reported as strong. Market prices have gradually been declining; about \$2 per week. However, this week with the additional volume coming on, I expect to see some more aggressive pricing being offered by late week. Shippers expect consistent supplies for the remaining of the import season, which should last for another 4 weeks. We will transition into Mexican and Domestic fruit in mid-April.



## GREEN ONIONS

The Green Onion market continues to come off with the recent nice weather in Mexico. Currently, the weather has cooperated and we are starting to have more supplies. This recent cold weather in January is causing occasional leaf minor and mechanical damage. The green onion market will continue to level off going into next week.



## KALE

The kale market continues to come off this week as more supply has come on. Quality is good with full bunches, and only an occasional yellow leaf being reported.



## LETTUCE ICEBERG

This market is firm with most shippers. Demand continues to exceed supplies. Escalated pricing is in effect on value added lettuce, and will likely raise to second tier escalators by the middle of the week. Temperatures in the Yuma region were in the eighties all last week and will continue to be warm until the weekend where temperatures will drop. The damage to the plants, however, continues to be the issue with this commodity. Puffiness, lightweights, discoloration, blister and peel and misshapen heads continue to be reported by all suppliers. The weights on liner lettuce are averaging 35-38 pounds. Production in Yuma through the month of March. Huron is expected to begin production around the third week in March.



# Commodity Updates



## LETTUCE LEAF

A few shippers have attempted to raise pricing while others have remained firm in the marketplace. Blister and peel continues to be seen on romaine as well as green and red leaf. This is an industry-wide issue. There is a gap in pricing depending on the supplier. The weather in Yuma was warm last week and this will continue until the end of this week. Other defects were noting include Twisting, mechanical, brittle, cupping and discoloration. All of these defects continue to be industry wide issues. Value-added items will have a shorter shelf life. Expect these issues to continue through the month of March. Huron will begin production late in March.



## LETTUCE TENDER LEAF

The Tender Leaf market has started to pick up on spring mix, arugula, baby spinach, and cello spinach. Quality issues are fair with minimal yellowing and bruising of the tender leaves. Look for these items to be tight going into next week.



## MELON (CANTALOUPE)

Temps in Central America are showing highs in the 90s and low in the 60s. This is ideal weather for growing melons. Shipments are currently down 27%. We will see mostly large fruit (9s/J9s) this week and light offering on smaller fruit (12s/15s/18s) for both east and west. Overall quality has been good and brix/sugar levels are 8-10%. The market is higher with moderate demand.



## MELON (HONEYDEW)

Weather in Central America this week calls for highs in the 90s and lows in the 60s. These are perfect weather conditions for growing melons. Very good supply this week on larger size fruit (4s/5s/6s). For smaller fruit, we are seeing light offerings from Guatemala, Honduras and Costa Rica. Price has also increased on the smaller fruit. Mostly large fruit for the next few weeks. New growing regions in Guatemala are reporting better quality. Fruit is showing brix/sugar levels ranging from 8-10%.



## WATERMELON

Good supplies of watermelon continue to be available to load in Nogales, AZ. Light volume continues to cross through Nogales, AZ as demand remains high. Few shippers are receiving watermelon from Jalisco. Market on watermelon is steady and expected to remain the same through the next couple of weeks. Quality on new crop watermelon being reported as good.



## ONIONS

Markets are on the rise in the Northwest due to increased demand and declining storage inventory as the season winds down. Onions crossing from Mexico into South Texas are limited in supplies due to recent rains and cold temperatures. With the large spread in pricing, demand is very active in the Northwest and pushing markets higher. Medium size yellow and red onions remain tight. White onions are nearly non-existent in the Northwest with the main supply now coming from Mexico into South Texas. Expect markets to rise into next week. Quality is good with some translucency showing up in the late storage onions. A reminder that the translucency must be two full rings in order to be considered a quality defect. Proper air circulation in your onion holding rooms is essential this time of year.



## PEARS

Washington Bartlett pears are done with minimal, remaining inventory shipping this week. D'Anjou and Bosc varieties are plentiful (smaller sizes, on D'Anjou, are a little snug). Quality is strong. With Chilean imports becoming available, the overall pear market continues to remain flat.



## PINEAPPLES

Supplies continue to improve and will continue to get better each week for the next month. Demand on the crownless has increased industry-wide and suppliers are doing their best to keep up with the current demand. Crownless supplies are expected to start improving in a couple of weeks. Current market prices on all sizes between \$10-\$12.





# Commodity Updates



## POTATOES

Russet potato carton markets continue to rise on 70 count and larger. Size profiles are leaning heavily towards 80ct and smaller for both Norkotah and Burbank varieties. Idaho Norkotah's are expected to finish up at the end of March with new harvests starting up again in August. Burbanks are the main variety and also have a small size profile. We are expecting a low volume of large size potatoes for the remainder of the Idaho storage crop. Quality issues are minimal at this time but expect to see some internal/external bruising, light hollow heart, external cuts, light peepers, and occasional soft rot. Advanced orders are needed to cover large size potatoes at this time.

## POTATOES (COLORED)

Red potato market is holding steady with good supplies and quality. Yellow potato markets are showing increases with lighter supplies in most regions. Red and yellow potatoes are available out of Washington, Idaho, California, North Dakota, and Florida. White potatoes can be found in California and Florida and those markets are steady to slightly higher. Mt. Vernon, WA is expected to finish by the end of March with new crop available again late August.

## SQUASH (WESTERN)

Italian and Yellow S/N- Moderate supplies of Italian squash available to load in Nogales, AZ this week. Moderate supplies of Yellow S/N also available to load in Nogales. Steady Supply of Italian squash continues on both #1 and #2 quality packs. Currently more #2 than #1 pack on Yellow S/N. Price on Italian squash continues to be low this week while the price on yellow s/n has stabilized in the mid-teens. Quality on both packs on Italian is good. Quality on yellow s/n is mostly fair to good this week. Supply on Italian squash exceeds demand. Supply on Yellow S/N meets demand.

## SQUASH (WESTERN)

Italian and Yellow S/N- Moderate supplies of Italian squash available to load in Nogales, AZ this week. Moderate supplies of Yellow S/N also available to load in Nogales. Steady Supply of Italian squash continues on both #1 and #2 quality packs. Currently more #2 than #1 pack on Yellow S/N. Price on Italian squash continues to be low this week while the price on yellow s/n has stabilized in the mid-teens. Quality on both packs on Italian is good. Quality on yellow s/n is mostly fair to good this week. Supply on Italian squash exceeds demand. Supply on Yellow S/N meets demand.

## STONE FRUIT

Stone fruit supplies continue to be steady on both coasts. Demand has been moderate. Quality on all varieties is being reported as strong. Market prices have been flat with an occasional drop on tray pack fruit. Most of the volume fill fruit is sizing on the larger side and markets remain fairly steady. All varieties are currently available; peach, nectarine and plums. We expect to see good supplies through the month of March and start to wind down as we move through April. Domestic season will get started by late April.

## TOMATOES (EASTERN)

Florida growers are on the cusp of breaking ground in the Ruskin Growing district marking the start of the Spring season. Early reports are disclosing concerns of weathered fruit trending larger in size to start the transition. Premiums are forecasted for smaller tomatoes as soon as next week and quality is expected to be mixed throughout all sizes and varieties. Until then, the market is currently priced with the value buy being in medium sized rounds as larger fruit becomes scarce at the end of the winter season. Roma tomato FOBs have increased by a couple of dollars as a result of upward pressure felt from a lessened amount of imports from Mexico. Grape and cherry tomato yields are mixed between farms as supply exceeds demand, however, there is slight upward pressure across the board with the expectation of supply contracting further between seasonal programs.

## TOMATOES (WESTERN)

A stronger national market in Mexico has resulted in a rising market for the US at AZ and TX crossings. Mexico farms in Culiacan have had to endure several cold rain systems amidst crops transitioning between winter and spring acreage slowing the rate of crossings into the US, resulting in an increase of \$2 - \$3 for vine-ripes, and nearly \$5 for romas. Grape tomatoes are in good production and widely available offering further value but may begin to strengthen as well as a result of farms realizing their seasonal decline. With mostly dry and warm weather conditions returning this week, markets may continue to rise in the short term and then improve the second half of the month as supply is restored through McAllen and Nogales facilities.



# Commodities at a Glance



Commodity / Region	Market	Quality
<b>Apples</b>		
Wenatchee/Yakima, WA and Hood River, OR	Steady	Good
Hudson/Pleasant Valley/Red Hook, NY	Steady	Good
Coopersville/Belding/Sparta, MI	Steady	Good
Aspers/Gardners, PA	Steady	Good
<b>Asparagus</b>		
Caborca, Mexico	Steady	Excellent
<b>Avocado (California)</b>		
Oxnard/Ventura, CA	Higher	Fair
<b>Avocado (Mexican)</b>		
Michoacan, Mexico	Steady/Higher	Good
<b>Bell Peppers (Eastern)</b>		
Hillsborough / Western Collier County, FL	Higher	Fair
Indian River / Dade County, FL	Higher	Fair
<b>Bell Peppers (Western)</b>		
Northern Sinaloa, Mexico	Steady	Good
<b>Berries (Blackberries)</b>		
Central Mexico	Steady	Good
<b>Berries (Blueberries)</b>		
Central Florida	Steady/Higher	Excellent
Central Valley, CA	Steady	Good
Oxnard, CA	Steady	Good
Central Mexico	Steady	Good
Southern Chile	Steady	Good
<b>Berries (Raspberries)</b>		
Central Mexico	Steady/Higher	Good
Baja, Mexico	Steady/Higher	Good
<b>Berries (Strawberries)</b>		
Santa Maria, CA	Steady	Fair
Oxnard, CA	Steady	Fair
Central Florida	Steady	Fair
Central Mexico	Lower/Steady	Fair

Commodity / Region	Market	Quality
<b>Broccoli</b>		
Celaya Guanajuato Mexico	Higher	Good
Oxnard/Santa Maria, CA	Higher	Good
Yuma, AZ	Higher	Good
<b>Brussels Sprouts</b>		
Salinas Valley, CA	Steady/Higher	Good
Oxnard, CA	Steady/Higher	Good
<b>Carrots</b>		
Bakersfield/Santa Maria, CA	Steady	Good
Coachella Valley, CA	Steady	Good
<b>Cauliflower</b>		
Yuma, AZ	Higher	Good
<b>Celery</b>		
Oxnard/Santa Maria, CA	Higher	Fair
Yuma, AZ	Higher	Fair
<b>Chili Peppers</b>		
Northern Sinaloa, Mexico	Steady	Good
<b>Cilantro</b>		
Baja, MX	Steady/Higher	Fair
Yuma, AZ	Steady/Higher	Fair
<b>Citrus (Lemons)</b>		
Coachella, CA / Yuma, AZ	Steady	Good
Merced/Bakersfield, CA	Steady	Good
Oxnard/Ventura, CA	Steady	Good
<b>Citrus (Limes)</b>		
Veracruz, Mexico	Higher	Fair
<b>Citrus (Oranges)</b>		
Merced to Bakersfield, CA	Steady	Good
Riverside, CA	Steady	Good
<b>Cucumbers (Eastern)</b>		
Hillsborough / Western Collier County, FL	Steady/Higher	Good
Indian River / Dade County, FL	Steady/Higher	Good





# Commodities at a Glance



Commodity / Region	Market	Quality
<b>Cucumbers (Western)</b>		
Northern Sinaloa, Mexico	Steady/Higher	Good
<b>Eggplant (Eastern)</b>		
Hillsborough / Western Collier County, FL	Higher	Fair
Indian River / Dade County, FL	Higher	Fair
<b>Eggplant (Western)</b>		
Northern Sinaloa, Mexico	Steady/Higher	Good
<b>Grapes (Green)</b>		
Coquimbo/Valaparaíso/Santiago/Rancagua, Chile	Lower	Good
<b>Grapes (Red)</b>		
Coquimbo/Valaparaíso/Santiago/Rancagua, Chile	Lower	Good
<b>Green Onions</b>		
Mexicali, Baja	Lower	Good
<b>Kale</b>		
Yuma, AZ	Lower	Good
<b>Lettuce Iceberg</b>		
Yuma, AZ	Steady	Fair
<b>Lettuce Leaf</b>		
Yuma, AZ	Steady/Higher	Fair
<b>Lettuce Tender Leaf</b>		
Yuma, AZ	Higher	Fair
<b>Melon (Cantaloupe)</b>		
Choluteca, Honduras	Higher	Good
Zacapa, Guatemala	Higher	Good
San Jose, Costa Rica	Higher	Good
<b>Melon (Honeydew)</b>		
Choluteca, Honduras	Lower/Steady	Fair
Zacapa, Guatemala	Lower/Steady	Fair
San Jose, Costa Rica	Lower/Steady	Fair

Commodity / Region	Market	Quality
<b>Melon (Watermelon)</b>		
Jalisco, Mexico	Steady	Good
<b>Onions</b>		
Ontario, OR to Nampa, ID	Higher	Good
Quincy/Hermiston, WA	Higher	Good
Tampico/Sonara, Mexico	Steady/Higher	Good
<b>Pears</b>		
Wenatchee/Yakima, WA and Hood River, OR	Steady	Good
Chile	Steady	Good
<b>Pineapples</b>		
Heredia, Costa Rica	Steady	Good
Retalhuleu, Guatemala	Steady	Good
<b>Potatoes</b>		
Hamer/Rupert, ID	Steady/Higher	Good
Quincy/Hermiston, WA	Steady/Higher	Good
Eastern Colorado	Steady/Higher	Good
Plover/Bancroft, WI	Steady/Higher	Fair
<b>Potatoes (colored)</b>		
Rupert to Rexburg, ID	Steady	Good
Bakersfield, CA	Steady	Good
Mount Vernon, WA	Steady	Good
Pasco/Tri-Cities, WA	Steady	Good
Red River Valley, ND	Steady	Good
Imokollee/Palm City/Punta Gorda, FL	Steady	Excellent
<b>Squash (Eastern)</b>		
Dade / Eastern Collier County, FL	Steady	Good
Hillsborough / Sarasota County, FL	Steady	Good
<b>Squash (Western)</b>		
Northern Sinaloa, Mexico	Steady/Higher	Good
<b>Stone Fruit</b>		
Coquimbo, Valaparaíso, Santiago and Rancagua, Chile	Lower/Steady	Good



# Commodities at a Glance



Commodity / Region	Market	Quality
<b>Tomatoes (Eastern)</b>		
Southern Florida	Steady/Higher	Fair

Commodity / Region	Market	Quality
<b>Tomatoes (Western)</b>		
Southern Nayarit/Sinaloa, Mexico	Steady/Higher	Fair

