

The Source

Commodity of the Month - Grapes

MARKET ALERTS

Lemons - Throughout the summer, fruit sizes 165ct and smaller will be in short supply. Markets for sizes 140ct through 200ct are strong and trending upwards.

Oranges - Navels near their end, Valencias will become the main variety in a few weeks. Sizes 88/113/138ct are scarce and will remain so throughout the Valencia season. Florida's season is concluding as they face challenges with regreening.

Iceberg Lettuce - As a result of the holiday push, there is a low availability. Cool weather has slowed production, but warmer temperatures are expected the following week, which may increase production. Lightweights, discolorations, and misshapen heads are common defects.

Lettuce Leaf - Romaine, green leaf, and red leaf supplies will be limited this week. Common defects include discoloration, brown butts, lightweights, twisting, and small bunches, as well as fringe and tip burns. Quality is expected to be fair in the coming weeks.

Onions - Red onion supply is limited, leading to higher pricing. However, as the California harvest increases, supplies are expected to improve. Yellows and whites remain steady to lower.

MAY 8, 2024

CROP UPDATES

Warm, mostly dry weather through Thursday, with showers and t-storms in Northern Florida. Temperatures will trend cooler, exacerbated by a cold storm system in California. Anthracnose impacts romaine and iceberg production, potentially leading to supply shortages. [Read more](#)

WEATHER

Arizona - Northerly winds will increase, with gusts increasing from 20-25mph. Temperatures will rise from mid 80s to low 90s, then to 101 by Sunday. Morning lows will be in the 50s to 60s.

California - A high pressure system will bring near-average temperatures along the coast and above-average temperatures inland. Morning temperatures will be cool, while daytime temperatures will be hot. Offshore winds will weaken, allowing cooling.

Florida - Warm, mostly dry weather through Thursday in Northern Florida. Expect showers and t-storms on Friday, increased shower activity over weekend, cooler temperatures, and gusting winds near 25 mph.

Mexico - Central Mexico expects warm daytime temperatures, high 90s through Sunday, low 90s to near 100s, and occasional light showers, with most spots remaining dry.

FREIGHT

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IN PEAK



Table of Contents



[Apples](#)



[Citrus \(Lemon\)](#)



[Melon \(Cantaloupe\)](#)



[Asparagus](#)



[Citrus \(Limes\)](#)



[Melon \(Honeydew\)](#)



[Avocados](#)



[Citrus \(Oranges\)](#)



[Melon \(Watermelon\)](#)



[Bell Peppers](#)



[Cucumbers](#)



[Mushroom](#)



[Berries \(Blackberries\)](#)



[Eggplant](#)



[Onions](#)



[Berries \(Blueberries\)](#)



[Garlic](#)



[Pears](#)



[Berries \(Raspberries\)](#)



[Grapes \(Green\)](#)



[Pineapples](#)



[Berries \(Strawberries\)](#)



[Grapes \(Red\)](#)



[Potatoes](#)



[Broccoli](#)



[Green Onions](#)



[Squash](#)



[Brussel Sprouts](#)



[Kale](#)



[Stone Fruit](#)



[Carrots](#)



[Lettuce Iceberg](#)



[Tomatoes](#)



[Cauliflower](#)



[Lettuce Leaf](#)



[Celery](#)



[Lettuce Tender Leaf](#)

Commodity Updates



Apples

Overall, the apple market is mostly stable, with a few varieties increasing in price. Galas and Golds continue to advance, while Fuji's and Pinks are no longer in a severe oversupply situation.

Commodity/Region	Supply	Price	Quality
Hudson, New York (September - June)	Steady	\$\$\$	Good



Asparagus

Peruvian supplies are improving this week, and the market is adjusting lower. Larger sizes such as XL's and Jumbo's still remain on the tighter side. Asparagus supplies in Washington are also good, and you should see some aggressive pricing after Mother's Day. It has been a slow start to Michigan asparagus season this week, but it should improve as we move into June. As Mexican supplies transition from Caborca to Southern Baja, they remain tight. Once Baja and Central Mexico get going, supplies should improve in Mexico in June.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Steady	\$\$\$	Good
Ciudad Obregon (Year Round)	Steady	\$\$\$	Good
Peru (Year Round)	High	\$\$\$	Good



Avocados

The market is getting slightly better on 60/70ct. Through the season, triggers may remain in play for 48ct. Peru is just around the corner, with fruit expected to arrive late-May/early-June. The size of the Peruvian fruit entering the US is expected to peak at 60/70ct; this is not normal for Peruvian fruit. Due to the high dry matter of Mexican fruit, ripening times remain short. California fruit is coming online in a light way with ripening time being longer due to lower dry matter.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Good
California (April - July)	Light	\$\$\$	Good



Bell Peppers

Spring crops have started in FL, and quality has improved. Jumbo sizes are peaking. The volume is moderate, but it will increase in 2 weeks once Georgia gets started. As the season ends, MX supply/quality is diminishing, most have now moved to Coachella on greens, and reds will start soon. Due to Canada's full production, the colored pepper market remains low.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	High	\$\$\$	Good
Mexico (November - May)	Light	\$\$\$	Fair
California (May - October)	Steady	\$\$\$	Excellent

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



Commodity Updates



Berries (Blackberries)

We are seeing better supplies, which will increase in late May. The product is being transferred to the West Coast Distribution points after crossing into the US.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
McAllen, Texas (October-May)	Steady	\$\$\$	Good
Georgia (April - July)	Light	\$\$\$	Good



Berries (Blueberries)

There are multiple growing regions available, including the California Central Valley, Mexican transfers, and Peruvian imports. Volume deals are being offered. Florida local product is offering good numbers. Georgia's product is also being offered out of Dover, FL. The product is crossing into the US for transfer to the West Coast Distribution points.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
Dover, Florida (Year Round)	High	\$\$\$	Good
McAllen, Texas (October-May)	Steady	\$\$\$	Good



Berries (Raspberries)

In California, most of the numbers are coming from Mexico and Baja. We are still waiting for warmer weather to bring on California products. Supply is expected to increase in late May. The product is crossing into the US for transfer to the West Coast Distribution points.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Fair
Dover, Florida (Year Round)	Steady	\$\$\$	Good
McAllen, Texas (October - May)	Steady	\$\$\$	Good



Berries (Strawberries)

A large volume of goods was shipped to freezers or juices by many shippers. Oxnard has been completed, and markets are reacting positively. Salinas, Watsonville, and Santa Maria are still going strong. Due to lower yields, most shippers are back on top of their numbers and quoting sold out all weekend. Florida's local crop is finished, but California fruit has been transferred.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
Dover, Florida (Year Round)	Steady	\$\$\$	Fair

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Broccoli

Salinas and Santa Maria continue to have good broccoli supplies and quality this week. The market is expected to remain steady over the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	Steady	\$\$\$	Good
Salinas (May - October)	Steady	\$\$\$	Good



Brussel Sprouts

This week, Brussels sprout supplies and quality remain excellent. The market is expected to remain steady into next week.

Commodity/Region	Supply	Price	Quality
Mexico (December-August)	High	\$\$\$	Good
Oxnard, CA (May - July)	High	\$\$\$	Good



Carrots

There is a steady market for whole carrots. Imperial Valley is now the main growing region. The Bakersfield area is next. The size looks good.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	Steady	\$\$\$	Excellent



Cauliflower

The quality and supply of cauliflower are improving this week. The market is likely to trend downward heading into the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	High	\$\$\$	Good
Salinas, California (May - October)	High	\$\$\$	Good



Celery

As we approach Mother's Day, this market remains firm. Currently, large sizing is the most readily available. Oxnard/Santa Maria will have enough supplies to meet demand. The market will ease after this week, but for now, most shippers are offering firm pricing. Quality continues to be strong, with only slight seeder reported. For the week, value-added items will continue to be escalated.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Citrus (Lemons)

ALERT

Peak fruit sizes are 115ct and larger. Through the summer, 165ct and smaller sizes will remain extremely tight. District 1 (San Joaquin Valley) and District 2 (Oxnard/Ventura County) are both in play and peaking at larger fruit. The main region is Oxnard/Ventura County, with San Joaquin Valley winding down. 140ct through 200ct markets are strong and continue to rise.

Commodity/Region	Supply	Price	Quality
Oxnard/Ventura (October - February)	Light	\$\$\$	Good
San Joaquin Valley (October - May)	Light	\$\$\$	Good



Citrus (Limes)

The market is about steady. As the manifest continues to peak on small fruit 230/250, larger sizes 110/150 which are mostly from the old crop are more limited as well as having quality issues such as blanching/oil spotting, which further restricts availability. Markets will settle post Mother's Day, particularly on small fruit, and larger sizes will remain tight.

Commodity/Region	Supply	Price	Quality
Veracruz (Year Round)	Steady	\$\$\$	Good



Citrus (Oranges)

ALERT

With Navels coming to an end, Valencia's will take over as the main variety within a few weeks. Valencia's crop will mirror Navel's. Fruit will peak at 72ct and larger; 88/113/138ct are extremely scarce and will remain so through Valencia season. Valencia's are currently grown primarily in Riverside, with the Central Valley expected to start mid/end-May. Navels have a good quality; Brix are in the 13-14 range. The Valencia's are in the 12 range. The season is nearly over in Florida as they struggle with regreening.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (Year Round)	Light	\$\$\$	Good



Cucumber

There is light demand, good availability out of Florida, McAllen, Nogales, and Baja is just getting started. Next week, Georgia will also have cucumbers. Over the next few weeks, expect good to strong supplies across multiple regions.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Steady	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good
Baja Californi (May - October)	Light	\$\$\$	Good



Eggplant

June's eastern supply shows potential for growth. Oversupply persists in Western markets despite a slight recovery. As fields approach their final harvests, eggplants will be smaller in size. With Georgia and Florida fields still ramping up production, it is difficult to obtain high-quality Grade 1 eggplants in the East.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Steady	\$\$\$	Good
Mexico (November - May)	Light	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Garlic

Garlic supplies domestically remain tight. In recent months, South America has seen a good harvest of Argentinian garlic. The overall supply gap will not be filled by this, however. Over the next few months, the garlic market is expected to become more volatile and tight.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Light	\$\$\$	Good
Bakersfield, California (Year Round)	Light	\$\$\$	Good
Gilroy, California (Year Round)	Light	\$\$\$	Good



Grapes (Green)

On both coasts, green grapes are mostly steady. There are some lots in the east showing more color. In about two weeks, Mexico should begin production.

Commodity/Region	Supply	Price	Quality
Chile (January - April)	Light	\$\$\$	Good



Grapes (Red)

On both coasts, red grapes are slightly lower. The quality is good. This market will most likely go back up in the next two weeks. In about three weeks, Mexican red grapes will cross in Nogales.

Commodity/Region	Supply	Price	Quality
Chile (January - April)	Light	\$\$\$	Good



Green Onions

The quality of green onions continues to improve this week. Next week, supplies should be good.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	High	\$\$\$	Good



Kale

This week, kale supplies are expected to be plentiful and of good quality. Now is an opportunity to promote kale.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Salinas, CA (May - OCT)	High	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Lettuce Iceberg

ALERT

As a result of the holiday push, there is a low availability of this commodity to begin the week. Salinas continues to be the primary location for production, though Santa Maria is also an option. Cool weather has slowed production, but warmer temperatures are expected the following week, which may increase production. Value-added items will be escalated throughout the week. Lightweights, discolorations, and misshapen heads are common defects. It is expected that supplies in northern and southern California will be better after this week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair
Santa Maria, California (March-December)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Lettuce Leaf

ALERT

The supply of romaine and green and red leaf will be limited throughout the week. You can also expect a very limited supply of romaine hearts. Value-added romaine and green leaf items will be escalated. The most common defects reported are discoloration, brown butts, lightweights, twisting, and small bunches. There have also been reports of fringe and tip burns. In the next few weeks, the quality should be fair, then new fields will be harvested.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Lettuce Tender Leaf

The availability of tender leaf items such as cilantro and Italian parsley will be limited in the next few weeks. In light of all the rains and excessive moisture, Quality is battling bacterial spotting. For the next few weeks, these markets will remain tight.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Oxnard, California (Year Round)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Melon (Cantaloupe)

Retail promotions are keeping demand strong, and offshore has excellent quality. There are deals available on offshore Cant 12s as suppliers try to close the offshore deal. Mexican cantaloupes are available this week, and growers are monitoring quality levels. Distributors are working on Memorial Day deals for specialty varieties starting 5/13.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

Supply of honeydews has increased, and the market has been strong. Dews from offshore remain higher in quality and peak at larger sizes. Smaller sizes of Mexican Honeydews are in high demand from Nogales in volume deals.

Commodity/Region	Supply	Price	Quality
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Arizona (June-July) (October-November)	Light	\$\$\$	Good
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Central America (December - May)	Light	\$\$\$	Good
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Melon (Watermelon)

With additional suppliers coming from Nogales, the watermelon market has normalized. Limited watermelons are being offered from Florida, and there are restrictions on where they can be shipped. Florida has delayed production due to lower yields caused by harvest issues.

Commodity/Region	Supply	Price	Quality
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Arizona (June-July) (October-November)	Light	\$\$\$	Fair
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Central America (December-May)	Light	\$\$\$	Fair
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Mushroom

Supply and availability are excellent.

Commodity/Region	Supply	Price	Quality
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Nationwide	Steady	\$\$\$	Good
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Onions

ALERT

The supply of red onions is limited and pricing is higher. As the California harvest ramps up, expect supplies to improve. Yellows and whites are steady to lower.

Commodity/Region	Supply	Price	Quality
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South Texas (July-April)	Steady	\$\$\$	Good
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Tri-Cities, Washington (July-April)	Light	\$\$\$	Fair
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California Desert (April - May)	High	\$\$\$	Excellent
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Pears

As D'Anjou supplies dwindle, the market remains firm. In June, most shippers expect to finish shipping for the year. The new crop of California Bartletts will begin south of Sacramento in the second week of July.

Commodity/Region	Supply	Price	Quality
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Hood River, Oregon (August-July)	Light	\$\$\$	Good
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Yakima, Washington (August-July)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



Commodity Updates



Pineapples

There are limited opportunities for spot market trading as suppliers focus on their contracts. Tropical weather has caused fruit to mature faster than normal, resulting in lower yields. It is expected to last until Memorial Day. Affected pineapples are 6ct crowned and 7ct crownless.

Commodity/Region	Supply	Price	Quality
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Costa Rica (Year round)	Light	\$\$\$	Good
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Potatoes

40 - 60 CT are higher. Excellent availability on 70 - 120 CT and 6 oz #2s.

Commodity/Region	Supply	Price	Quality
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Bancroft, Wisconsin (August-July)	Steady	\$\$\$	Excellent
Idaho Falls, Idaho (August-July)	High	\$\$\$	Excellent
Monte Vista, Colorado (August-July)	Steady	\$\$\$	Excellent
Pasco, Washington (August-July)	High	\$\$\$	Excellent



Squash

There are good supplies available in several areas. Nogales is still connected to Florida, and there is overlap with newer areas in California and Georgia as well. Over the next few weeks, you can expect good quality and supply.

Commodity/Region	Supply	Price	Quality
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Florida (November - May)	Steady	\$\$\$	Good
Mexico (November-May)	Steady	\$\$\$	Good
Georgia (May - June)	Steady	\$\$\$	Good
California (May - Oct)	Steady	\$\$\$	Good



Stone Fruit

The domestic stone fruit season has begun. We are currently shipping peaches, nectarines, apricots, and cherries. About three weeks from now, plums will begin to appear. The Chilean Kiwi market is slightly lower on good volume.

Commodity/Region	Supply	Price	Quality
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San Joaquin Valley (May-October)	Light	\$\$\$	Fair
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Tomatoes

As we've seen a slight increase in production, markets are steady to slightly lower. Quality is generally good in FL, with crown picks yielding big sizes in the Ruskin Palmetto area. Sinaloa is still rolling out west, but they will finish in early June weather permitting. Baja has started in a light way where we will be seeing volume increase as more growers come online. Grape and cherry tomatoes are readily available.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Light	\$\$\$	Good
Florida (November-May)	Steady	\$\$\$	Good
Baja California (Spring/Summer - NOV)	Light	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$ -Steady, \$ -High

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FRESH LINK



Weather Updates



CALIFORNIA

A high pressure system remains over the area bringing near average temperatures along the coast and above average temperatures inland. It will be cool in the morning with lows in the upper 30s to low 50s, and hot in the daytime with highs in the mid 60s to low 80s. As the winds turn offshore Thursday, temperatures will rise further inland, reaching the low-upper 80s away from the coast. The offshore flow weakens over the weekend, allowing for some cooling, but temperatures remain in the low 60s to mid 80s.



MEXICO

Over a good portion of Central Mexico, daytime temperatures will be warm and mostly 90 degrees or higher. Through Sunday, temperatures will reach the low 90s to near 100 degrees. Throughout the weekend, lows will drop into the upper 50s to mid 60s. Several light showers may occur over the area, but most spots should remain dry.



FLORIDA

Through Thursday, it will be warm but mostly dry. Northern Florida can expect some showers and t-storms on Friday. There will be a greater amount of shower activity over the weekend, but it will still be isolated. Temperatures should trend cooler toward the weekend. Throughout much of Southern Florida, winds will gust near 25 mph.



ARIZONA

There will be increasing northerly winds today, with gusts of 20-25mph in the morning increasing to 30-38mph in the afternoon. Through Thursday, winds gradually decrease, becoming southwesterly by Friday. During a building ridge of high pressure, high temperatures will rise from mid 80s to low 90s by Wednesday and Thursday, to mid 90s to 101 by Sunday afternoon. Through Friday, morning lows will be in the upper 50s to low 60s, warming to the mid 60s by Sunday.

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

Freight Updates



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	04/22/24	04/29/24	05/06/24	Change from	
				week ago	year ago
U.S.	3.992	3.947	3.894	↓ -0.053	↓ -0.028
East Coast (PADD1)	4.047	4.025	3.966	↓ -0.059	↓ -0.020
New England (PADD1A)	4.326	4.309	4.277	↓ -0.032	↓ -0.097
Central Atlantic (PADD1B)	4.255	4.234	4.208	↓ -0.026	↓ -0.081
Lower Atlantic (PADD1C)	3.941	3.919	3.846	↓ -0.073	↑ 0.012
Midwest (PADD2)	3.935	3.882	3.814	↓ -0.068	↓ -0.013
Gulf Coast (PADD3)	3.707	3.657	3.617	↓ -0.040	↑ 0.004
Rocky Mountain (PADD4)	3.883	3.787	3.785	↓ -0.002	↓ -0.320
West Coast (PADD5)	4.661	4.625	4.580	↓ -0.045	↓ -0.050
West Coast less California	4.154	4.110	4.079	↓ -0.031	↓ -0.359
California	5.244	5.216	5.155	↓ -0.061	↑ 0.308

*prices include all taxes

For more information: <https://www.eia.gov/petroleum/gasdiesel/>

Crop Update



A high-pressure system remains over the area bringing near average temperatures along the coast and above average temperatures inland. It will be cool in the morning with lows in the upper 30s to low 50s, and hot in the daytime with highs in the mid 60s to low 80s. As the winds turn offshore Thursday, temperatures will rise further inland, reaching the low-upper 80s away from the coast. The offshore flow weakens over the weekend, allowing for some cooling, but temperatures remain in the low 60s to mid 80s.

Over a good portion of Central Mexico, daytime temperatures will be warm and mostly 90 degrees or higher. Through Sunday, temperatures will reach the low 90s to near 100 degrees. Throughout the weekend, lows will drop into the upper 50s to mid 60s. Several light showers may occur over the area, but most spots should remain dry.

Through Thursday, it will be warm but mostly dry. Northern Florida can expect some showers and t-storms on Friday. There will be a greater amount of shower activity over the weekend, but it will still be isolated. Temperatures should trend cooler toward the weekend. The cold storm system that rolled through California over the weekend brought moderate precipitation to the Salinas Valley with light trace amounts recorded in the Santa Maria and Oxnard regions. The Salinas Valley received between 1/4"-3/4" of an inch of rain along with much cooler temperatures and strong winds. This late season storm system will only exacerbate the mold, mildew and disease pressure impacting the fields. Anthracnose continues to impact romaine and to a lesser extent iceberg production with lighter yields as growers work through affected acreage. Production continues to show smaller head sizes with less solidity/density contributing to lighter carton weights. Growers reaching for supplies are entering these stands early to meet current demand, leaving less available acreage as harvests gain momentum. This may lead to some short-term supply shortages in iceberg, romaine and cauliflower moving forward.



Anthracnose

Bacterial spotting is being reported in current cilantro and parsley stands, drastically lessening yields in the near term.

Strawberry production is expected to quickly rebound from the recent rains with a good fruit set and various regions in production currently.

The California cherry growing regions of Central California received up to 3/4" of an inch of rain from this late season storm. Growers had their fungicide spray rigs and wind rigs out in the groves following the system to help dry out the groves. Overall damage is expected to be minimal from early reports from the regions. Production will continue to slowly gain momentum as we move through May. Washington cherry season is slated to begin with light harvests in early June with the crop reported to be in good shape by most growers.



Bacterial Spotting

The domestic melon season is just around the corner as offshore volumes decline seasonally. Current supplies from Guatemala continue with good quality and brix reported. Supplies will quickly decline as the offshore season comes to an end over the next few weeks. Domestic supplies from the southwestern desert regions are set to begin light harvests the week of May 20th. Early field reports indicate the fruit being on the smaller side when harvests begin.

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