

WEEKLY MARKET REVIEW

August 30, 2018

OVERVIEW

Most commodities are steady. Cabbage is **EXTREME** due to shorter supply. Valencias are still in an **ACT OF GOD** with higher prices and shortages in supply. Lemons are also in an **ACT OF GOD**, but Romaine commodities remain good buys.

MARKET ALERTS



CILANTRO – EXTREME



GREEN CABBAGE – EXTREME



LEMONS – ACT OF GOD



MUSHROOMS – ESCALATED











ORANGES (VALENCIAS) – ACT OF GOD

TRANSPORTATION & WEATHER










EXTREME With full implementation of the ELD now in place as well as a nationwide shortage of available trucks on the market, rates are expected to continue to be above normal through the remainder of the summer. We are seeing an average increase of 15 to 20 percent over last year's comps.








ASHVILLE:

	Thu 08/30 89° 69°  Chance of a Thunderstorm	Fri 08/31 88° 70°  Chance of a Thunderstorm	Sat 09/01 88° 71°  Chance of a Thunderstorm	Sun 09/02 90° 70°  Partly Cloudy	Mon 09/03 91° 70°  Clear	Tue 09/04 91° 70°  Clear	Wed 09/05 91° 70°  Partly Cloudy
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JALISCO:








Thu 08/30 80° 61°  Chance of a Thunderstorm	Fri 08/31 77° 60°  Chance of a Thunderstorm	Sat 09/01 77° 59°  Chance of a Thunderstorm	Sun 09/02 79° 60°  Chance of a Thunderstorm	Mon 09/03 80° 61°  Chance of a Thunderstorm	Tue 09/04 79° 61°  Chance of a Thunderstorm	Wed 09/05 78° 61°  Chance of a Thunderstorm
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SALINAS:








Thu 08/30 70° 56°  Partly Cloudy	Fri 08/31 71° 56°  Partly Cloudy	Sat 09/01 70° 56°  Partly Cloudy	Sun 09/02 71° 55°  Partly Cloudy	Mon 09/03 72° 55°  Clear	Tue 09/04 74° 56°  Clear	Wed 09/05 74° 56°  Clear
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SELMA:

Thu 08/30	Fri 08/31	Sat 09/01	Sun 09/02	Mon 09/03	Tue 09/04	Wed 09/05
89° 54°	91° 58°	94° 63°	98° 64°	97° 64°	97° 65°	97° 64°
						
Partly Cloudy	Clear	Clear	Clear	Clear	Clear	Clear

HUDSONVILLE:

Thu 08/30	Fri 08/31	Sat 09/01	Sun 09/02	Mon 09/03	Tue 09/04	Wed 09/05
74° 55°	82° 68°	83° 68°	84° 70°	85° 71°	87° 71°	84° 66°
						
Partly Cloudy	Partly Cloudy	Chance of a Thunderstorm	Chance of a Thunderstorm	Chance of a Thunderstorm	Partly Cloudy	Partly Cloudy

GOOD BUYS

Butternut Squash!

Step aside zucchini. A new squash is *back* in town.

Who else is ready for the return of our favorite fall produce?! Amid your planning for the next season's menu offerings, don't sleep on the sincere versatility of butternut squash. New crops on this hard-shelled veg are officially ramping up with readily available supplies!

Thanks to its easy-to-peel surface and rich flavor, butternut squash has continued to maintain its status as MVP of the gourd family. From early fall to late winter, we see it in nearly every dish under the sun: lasagna, pizza, salads, soups, and yes, even desserts!

However, some of our favorite butternut squash recipes are the ones that work to use up the whole produce, from the inside-out. This Orecchiette pasta dish is immediately enhanced with the squash pulp and seeds. Prepare to be pleasantly surprised!

[Orecchiette with Butternut Squash and Sage](#)

Ingredients

- Coarse salt
- 12 ounces orecchiette
- 2 tablespoons extra-virgin olive oil, plus more for drizzling
- 1 small butternut squash, halved and peeled, seeds and pulp scooped and reserved, flesh cut into 1/2-inch pieces (4 cups)
- 3 tablespoons unsalted butter
- 1/4 cup packed fresh sage leaves
- 1 1/3 cups whole-milk ricotta, for serving
- Poppy seeds, for serving

Directions

1. Bring a large pot of generously salted water to a boil. Cook pasta until al dente. Reserve 1 cup pasta water; drain.
2. Meanwhile, heat oil in a large straight-sided skillet over medium heat. Add squash seeds and pulp. Cook, stirring occasionally, until seeds puff and turn golden, 10 minutes. Season with salt; transfer to a plate. Add 2 tablespoons butter to skillet; melt. Add sage and cook, stirring occasionally, until crisp, 2 minutes. Transfer to another plate. Add squash flesh to skillet. Season with salt, cover, and cook, stirring occasionally, until tender, 10 minutes.
3. Stir in pasta, 1/2 cup pasta water, and remaining 1 tablespoon butter. Simmer until thickened slightly, about 2 minutes. Add more pasta water, a few tablespoons at a time, until pasta is evenly coated; season with salt. Top with squash pulp and seeds, sage leaves, ricotta, and poppy seeds. Drizzle with oil and serve.

FRUITS & VEGETABLES



AVOCADOS Markets continue to ease back as inventories begin to improve and relieve pressure on the markets. Sizing is still mixed and shorter on the smaller grades. We expect this condition to continue through the first week of October. Due to the lower markets, the growers in Mexico are scaling back production to

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stabilize the freefall. Outlook for September remains volatile. October should return to normal supply barring no weather events or unrest.



BANANAS Demand on this item remains firm and supplies are expected to remain good through the rest of the year. Quality is good.



PINEAPPLES Volumes will remain light through September. Sizing has, and will continue to improve on larger sizes. We do expect good volumes for October and the remainder of the year.



GRAPES Grapes out of California continue to plug along with good supplies and quality. Green prices are expected to begin to trend upward in the coming weeks as the supplies will begin to be limited.



KIWIS Good supplies available on Chilean product.



BLUEBERRIES Quality is good and supplies are plentiful.



BLACKBERRIES Supplies are good; however, the heat in the northern growing area of California is causing the berries to mature faster causing some issues with quality.



RASPBERRIES Supplies are steady; however, the heat in the northern growing area of California is causing the berries to show some quality issues.



STRAWBERRIES The heat in the Northern growing area of California is causing the berries to mature faster than normal. This also causes a drop in size and soft/bruising berries; however supply is good.

CALIFORNIA-ARIZONA CITRUS

The lemon market is in an **ACT OF GOD**. We are seeing extreme shortages in supply as well as much higher prices. The demand for Valencias has far exceeded supply as well. Markets will remain high as the domestic crop has come up extremely short this year.



GRAPEFRUIT | Texas grapefruit is available. Florida Star Ruby/Red is available. California grapefruit has started.



LEMONS ACT OF GOD As stated previously, this is primarily due to the very hot weather which has matured the fruit much faster than normal leaving us with virtually no supply and very standard grade fruit. Please note, prices will be very high and product will be short until this is resolved. Other contributing factors:

- Arrivals from Argentina into the East Coast are fewer than expected.
- Chile has been sending fruit to locations outside of the US, in expectation of Argentina arrivals into the USA, which as noted above, are not happening at the usual volume.
- Various rain events in Argentina and Chile causing gaps in harvest/packing.
- Uncertain Mexico supply remains in question in terms of total volume for the season due to cold weather which slowed fruit production at the beginning of the year.

Between now and October (when desert production is in full swing), we expect to see severe pro rates. Produce Alliance recommends accepting flexibility in size and grade as a key to mitigating this situation.



LIMES (PERSIAN) The market seems to be getting better. Quality is fair due to the old crop, but supplies have stabilized.

ORANGES ACT OF GOD Our Valencia growers in the San Joaquin Valley were affected by extreme heat which caused post bloom conditions in our fruit. As a result, this has caused a lighter crop and there is virtually no small fruit available. At this time, our growers suggest moving to a larger size Valencia. We also have one supplier that will not have any small fruit at all and has evoked an ACT OF GOD. We apologize for this disruption and recommend that you take oranges off your menu or change to a larger size at this time. We are monitoring this situation closely and will update you with more information regarding Valencias as the week continues. Thank you again for your support and understanding.

Specialties:

- Pink Lemons are available.
- Gold Nugget mandarins are available.
- Ojai Pixie Tangerines are available.

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- Only a few Minneola's are left.
- Domestic Blood oranges and Cara Caras are available showing good quality.
- New Zealand Meyers are available.
- Halos and Cuties are available.

CALIFORNIA LETTUCE



GREEN & RED LEAF Red leaf quality is good, supplies are normal, and demand is average. Green leaf supplies are normal with good quality and demand has been average.



BUTTER Supplies are normal, and demand and quality are both good.



ICEBERG LETTUCE Lettuce supplies continue to be below budget. Demand has been very good even with lower prices. Quality overall has been very good.



ROMAINE Supplies are slightly below normal, demand is strong, and quality is good with occasional light fringe burn.



ROMAINE HEARTS Supplies are slightly below normal; however, demand and quality are both good.

EASTERN & WESTERN VEGETABLES



PEPPERS

Green Bell Pepper: The market is showing great availability on all sizes across the board. Quality is good with FOBs remaining steady in the East.

Red Bell Pepper: Supplies have lightened up in the West and quality has declined. FOBs have gone up by about \$2-\$4.

Yellow Pepper: Production has eased bringing the market off with deals being made on choice. Quality is very nice.

Mini Sweet Pepper: Good supplies are available. These are excellent for fajitas and stir fry, call for deals on mini sweet peppers!

Mixed Chili Pepper (Jalapeno, Anaheim, Poblano, Serrano): Supplies remain steady in the East on core pepper varieties while quality in the west is hit or miss as transition on domestic product is slow to start. Baja continues crossing decent quality on the core line of product.



EGGPLANT Supplies in the East are light mostly due to rainfall. Quality is fair to good.



CUCUMBERS The Eastern market is a bit active, but mostly readily available. Cucumbers look to be in good supply for the next week. FOBs are fairly steady. Quality reports, however, have been a bit scattered and vary by shipper. Some fields are producing great quality, and some are very poor.



ENGLISH CUCUMBERS (EURO) There are excellent supplies crossing through Nogales and McAllen.



GREEN BEANS WATCH LIST Despite some price relief, beans are still very tight in the East due to rain & quality. Prices have come down slightly in the past week; however, they are still firm. Until weather stabilizes and gives the plants an opportunity to improve quality, expect pricing fluctuations



ZUCCHINI AND YELLOW SQUASH Supply is still very tight with a very active market in the East. Prices are feeling quite a bit of pressure to stay high. Quality is mostly good, with some yellow showing heavy scarring once again.



PUMPKINS: Now available out of Indiana and Michigan.

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ACORN, BUTTERNUT & SPAGHETTI SQUASH Now available, good quality and good supply.



MANGOES Good supply and good availability.



MELONS

Cantaloupe: Supplies remain good on larger-sized fruit as continued warm weather is pushing the crop forward. Sizing is still leaning heavy to 9's with limited supply on 12's and 15's. Quality on the new crops is outstanding, and brix levels are at 14 to 16 with occasional higher levels, and a good external appearance showing even netting and full slips. Markets were up slightly this week due to heavier Labor Day pulls for retail ads.

Honeydew: Supplies are plentiful as continued warm weather is pushing the crop forward. Quality is excellent with sugar levels ranging from 12 to 14. Sizing mix is heavy to 5's with limited supply on 6 and 8's. Markets were up slightly this week due to heavier Labor Day pulls for retail ads.



WATERMELONS Seedless watermelon market has firmed up due to lighter supply, mostly a result of heavy rain and heavy holiday demand on retail ads. Supplies are loading out of Texas, Michigan, Oklahoma, Indiana and California.



HERBS

Supplies remain steady and quality continues to be very good.

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

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Lavender	Steady	Good	USA
Lime Leaves	Steady	Good	USA



ARTICHOKES Quality is excellent and demand is good.



ARUGULA Quality and supplies have improved and product is available.



ASPARAGUS The weather in Mexico and Peru continues to affect sizing of jumbo asparagus which has been smaller than normal. Expect to see these issues for another few weeks, as well as shorter supplies since Mexican supplies are diminishing faster than expected. Peru will be starting in about a week.



BOK CHOY Quality is average and demand is fair.



BROCCOLI / BROCCOLI FLORETS Supplies are on the lighter side this week, but look to be steady in the upcoming weeks. The demand remains good and the market is firming up.



BRUSSEL SPROUTS Supplies are light and quality is good. Prices are steady.



CARROTS We are seeing both good quality and volume.



CAULIFLOWER: Quality is good. Volume is down slightly due to cooler temps having slowed the crop down. Demand is decent, we could see prices increase since supplies seem to be down.



CELERY Supplies are normal and the market is steady with very light demand. Quality is good out of Salinas.



CORN Good volume continues to become available on yellow and white product out of the San Joaquin Valley corn market (yellow, white and bi-color). Good supplies are also available out of Carolinas, Indiana and Illinois. Good time to promote, quality is excellent.



CILANTRO EXTREME Supplies are light due to poor quality.



FENNEL Supplies for the week will be good and quality is good.



GARLIC: The market is about 50% done with the 2017 crop. Supplies are steady and prices remain high on domestic product.



GINGER Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Costa Rica and Honduras and Peru with no major quality issues being reported.



GREEN CABBAGE EXTREME Cabbage is in shorter supply and we are seeing prices rise rapidly. This is primarily due to weather-related issues.



GREEN ONIONS Iced - The market is improving. **Iceless** - Like the iced market, the iceless market is improving.



JICAMA Markets remain firm due to ongoing short supplies and will continue to see some quality and shelf life issues.



KALE (GREEN) Quality and supplies are good.

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MACHE Availability is adequate.



MUSHROOMS ESCALATED Mushroom growers are still recovering from the severe damage in the South and Southeast, as well as Puerto Rico. Hurricane Harvey and Irma have resulted in a tightening market, and the American Mushroom Institute has said it expects supply to be affected for several months. We are starting to see some improvement of supply and will keep you informed of any changes.



NAPA Supplies and demand are steady.



RAPINI Supplies have improved and markets are down. Quality has improved.



PARSLEY (CURLY, ITALIAN) Quality and supplies are good.



RADISHES Supplies are steady, and quality is good shipping through Arizona and Florida.



RED CABBAGE Markets remain firm despite decent supplies out of the Midwest. Quality has been hit or miss while sizing remains good. Central coast production is good; however, with lighter volume in the East, the market has firmed up in the West.



SNOW & SUGAR SNAP PEAS Snow and sugar snap peas supplies are steady through Miami and prices are higher.



BABY SPINACH Baby and clipped spinach supplies are good, and quality is fair.



BUNCHED SPINACH Quality and supply have improved and product is available.



SPRING MIX Quality and supply have improved and product is available.



ONIONS Idaho/Oregon and Washington are now shipping all three colors fresh out of the field. Quality is strong to start, and harvest is running smoothly with minimal interruption or weather concerns. Skin is starting to get better as the onions continue to cure down. While sizing on yellows is still peaking to jumbos, the availability of larger-sized onions is improving. We are seeing Colossal and Super Colossal in better supply, which has resulted in some reduced pricing on these items. We are seeing white onions are still in short supply, and remain elevated in price. Reds are much more plentiful as well, and those prices have also been reduced. Overall, the season appears to be leaning toward a more 'normal' year in terms of size, yield and quality. What was once expected to be a very large crop has been reduced in size in part to the heat wave the Northwest has been experiencing over the last several weeks.



POTATOES (IDAHO) Growers are continuing to harvest new crop potatoes and the market is a bit unstable. It is expected that all growers will be in Norkotahs beginning next week. Prices continue to trend down, and the size profile is still unknown. Quality currently has been excellent, and weather has been great during harvest. There has been nothing put in storage yet and everything has been packed and marketed out of the field.



TOMATOES

TOMATOES – EAST

- **Rounds:** Tomato supply continues to tighten with light supplies and increased rainfall. Only a handful of growers are harvesting right now, with most being in the middle of a transition period. More growers will start back up in September, but volume is not expected to be significant. FOBs are firmly up another \$2.00. Quality has not been impacted too much by the weather, so the fruit is shaping up nicely.
- **Romas:** Demand and supply both remain light, but steady. FOBs are steady for next week and quality is mostly good.
- **Grapes:** With more supplies available, prices will fall about \$2 as we move forward into next week. Quality is still a bit of a challenge, with rain and heat being the major factors.

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- **Cherries:** Things remain mostly unchanged for cherries. FOBs will remain stable, while quality is still a little unstable.

TOMATOES - WEST AND MEXICO

- **Rounds:** Demand is firm. With light supplies in the East, many are trying to fill the void from the West despite freight rates. FOBs are up slightly due to demand from the East. Quality is mostly good; they typically have a short shelf life and feel very soft to the touch.
- **Romas:** Supplies are snug keeping firm pressure on FOBs. Prices are up slightly this week and could be active for the next few weeks. Quality is fair at best with most fruit feeling soft.
- **Grapes:** Demand & supply has been mostly steady. FOBs are expected to remain the same. Quality is good to excellent.
- **Cherries:** Supplies remain snug, yet steady. FOBs will remain unchanged. Quality is mostly good, but some shippers are showing light color.

WASHINGTON APPLES, PEARS, TREE FRUIT, AND STONE FRUIT



Apples – Northwest: We will continue to have storage supply of the major varieties of apples through the remainder of summer, and we have finished packing all varieties. The quality, condition, and color on almost all varieties looks very good. New crop gold varieties and galas are starting up this week, followed by Fuji in two weeks. Granny and Red Varieties are projected to ramp up the first week of September followed by pinks in October.

Apples – Northeast: There is light volume on reds out of New York and Chilean Granny Smith through the port of Philadelphia.



Pears: New crop Bartlett pears have started with good supply available especially on the larger (70's to 100's) sizes. Expect to see new crop Bosc and D'Anjou start first week of September.



Stone fruit:

- **Plums:** Moderate supply and steady demand has kept a firm FOB market in the high teens to mid-20's on the red and black varieties out of the San Joaquin Valley.
- **Peaches:** Supplies are good on yellow and white tray pack as well as volume fill out of the San Joaquin Valley. In the Southeast, ½ Bu's are available on yellow flesh varieties. We expect the summer harvest to finish up mid-September.
- **Nectarines:** Supplies are good on yellow and white tray packs as well as volume fill out of the San Joaquin Valley. Volumes will begin a slow decline this week with the end of season expected sometime mid to late September.
- **Cherries:** This market is officially done for the season.
- **Italian Plums:** Production is starting up out of the Northwest. The first sign fall is near!
- **Northwest Yellow/White Peach and Nectarines:** These are now available out of the Northwest as well as California.