



WEEKLY MARKET REVIEW

July 25, 2019

OVERVIEW

Iceberg, romaine, and leafy greens have improved, and the market is good. Strawberries are improving quickly. Smaller-sized lemons are still very **EXTREME**. Celery is a good buy.

MARKET ALERTS



AVOCADO - ESCALATED



ASPARAGUS - EXTREME



LEMONS (SMALL SIZES) - EXTREME



ONIONS (RED, YELLOW, & WHITE) - ESCALATED



GRAPE TOMATOES – ESCALATED

TRANSPORTATION & WEATHER



Freight rates continue to be above average and available trucks are still an issue nationwide. Mexico is experiencing a National Fuel Shortage due to alleged corruption. We have not seen this affect supply crossing into the United States quite yet, but it could affect imports over the next several weeks. We will keep you informed when we have updates.

COACHELLA:










Thu 7/25	Fri 7/26	Sat 7/27	Sun 7/28	Mon 7/29	Tue 7/30	Wed 7/31
110° 86° F	113° 87° F	116° 90° F	118° 88° F	116° 85° F	110° 84° F	105° 84° F
Partly Cloudy	Sunny	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy

BAKERSFIELD








Thu 7/25	Fri 7/26	Sat 7/27	Sun 7/28	Mon 7/29	Tue 7/30	Wed 7/31
104° 79° F	105° 77° F	106° 79° F	110° 79° F	107° 75° F	103° 75° F	101° 74° F
Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny

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LAKE PARK:

Thu 7/25	Fri 7/26	Sat 7/27	Sun 7/28	Mon 7/29	Tue 7/30	Wed 7/31
87° 69° F	85° 69° F	87° 68° F	86° 68° F	89° 68° F	89° 69° F	90° 70° F
 Partly Cloudy	 PM Thunderstorms	 PM Thunderstorms	 Scattered Thunderstorms	 Isolated Thunderstorms	 Isolated Thunderstorms	 Scattered Thunderstorms

SALINAS:

Thu 7/25	Fri 7/26	Sat 7/27	Sun 7/28	Mon 7/29	Tue 7/30	Wed 7/31
73° 57° F	72° 57° F	76° 59° F	78° 57° F	71° 56° F	69° 55° F	71° 55° F
 Partly Cloudy	 Sunny	 Partly Cloudy	 Sunny	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy

JALISCO, MX:

Thu 7/25	Fri 7/26	Sat 7/27	Sun 7/28	Mon 7/29	Tue 7/30	Wed 7/31
83° 65° F	83° 66° F	83° 66° F	82° 65° F	82° 65° F	80° 63° F	83° 63° F
 PM Thunderstorms	 Scattered Thunderstorms	 Scattered Thunderstorms	 Scattered Thunderstorms	 Scattered Thunderstorms	 Scattered Thunderstorms	 Scattered Thunderstorms

GOOD BUYS

Each week, our team spotlights commodities based on how favorable prices, quality, and supply are in the market. Stay ahead of the trends and look to these good buys for their stellar performance in the fields! Please see each individual product for more information below and reach out to your PA representative for order guide information.

Commodity	Market Update	Produce Expert Tip
Celery	Plenty of supply is available. Quality is excellent.	We are CELEbrating CELERY this Good Buy Friday! Adding celery to your meals/diet, provides one a great source of antioxidants along with an abundance of vitamins and minerals. The veggie also has an alkalizing effect as it is packed with magnesium, iron, and sodium. Whether eaten raw, cooked in soup, or blended in a smoothie, this vegetable should most definitely become the newest addition to your grocery list!

FRUITS & VEGETABLES



AVOCADOS ESCALATED This week, we expect to see the start of an overall decline in total supply entering the marketplace moving forward. While Mexico is expected to stay steady with weekly harvest, we will see a dramatic decrease in California and Peruvian arrivals into North America in the coming weeks. We anticipate that this will create a further strengthening of field pricing for Mexican fruit as that becomes the dominant origin for the back half of the summer. Based on current estimates, we would expect market conditions to remain very strong for August and most of September. In addition, the Flor Loca size curve is skewed towards smaller fruit, meaning 48s and larger should be extremely tight. Presently there is decent supply of California and Peru in the market; however, supply will deplete quickly as harvest slows in both origins.



BANANAS Conditions are relatively stable with inbound supply as we enter the summer months. Volumes are declining slightly from all importers, but this is normal for the time of year. Fruit quality is very good.

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PINEAPPLES The market continues to be extremely tight. Very limited sizes are available. This will continue for at least the next two weeks.



GRAPES Flames have been getting packed for two weeks with more growers joining in this week. Flames will go for the next month, with the Krissy variety starting in about 2-3 weeks, as long as they get the color needed. Sugraones and Ivory are just getting started, as growers have been waiting for sugar so they can harvest.



KIWIS Good Supply available on Chilean product.



BLUEBERRIES We will continue to see low volumes for the next few weeks. Quality is good.



BLACKBERRIES We will continue to see low volumes for the next few weeks. Quality is good



RASPBERRIES We will continue to see low volumes for the next few weeks. Quality is good.



STRAWBERRIES Strawberry volumes and quality are improving.

CALIFORNIA-ARIZONA CITRUS



GRAPEFRUIT CA Star Ruby Grapefruit is available. Fruit is excellent.

Imports/Specialties available:

- Blood Oranges
- Gold Nugget
- Ojai Pixie
- Sunkist Delite



LEMONS EXTREME We continue to have tighter supply and higher prices on smaller sizes (165s/200/235s). This is also impacting the 140s as customers move up in size. We still have more 115s and larger, but we are going to get tight on those sizes. Prices are rising.



LIMES (PERSIAN) We are seeing a spike in the market before it levels out and comes down a little. With aging fruit and lower-quality left on the trees, there is lower-quality fruit coming into the marketplace. We will also start seeing smaller-sized fruit; this should stabilize as the weather changes and rain comes. We are getting into the rainy and tropical depression season, which can cause a disturbance in the market as well. We will continue to see higher pricing for the next month or a little longer.



NAVELS/ VALENCIAS Navels will be winding down this week. The season will end sooner than expected. Valencia's are available.

WEST COAST LETTUCE



GREEN

Supply is better this week. We are seeing some irregular sizing and fringe/wind burn. Demand is steady.

RED LEAF

Red leaf volumes are steady. However, there is some light fringe/wind burn and irregular sizing.



BUTTER Volume is improving. We are continuing to see some internal burn, puffy heads, and irregular sizing. Demand is steady



ICEBERG LETTUCE Supply has increased and the market is good. Quality has been good overall.



ROMAINE Romaine supply is good, but we are dealing with many quality issues. Fringe, wind burn, and light twist are present, which are all contributing to the reduction in yields at the field level.



ROMAINE HEARTS Romaine supply is good, but we are dealing with many quality issues. Fringe, wind burn, and light twist are present, which are all contributing to the reduction in yields at the field level.

EASTERN & WESTERN VEGETABLES

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PEPPERS

Green Bell Pepper: Green peppers are mixed for the week. The East is seeing a price increase as supply tightens up due to transitioning to new fields. The West appears to be flat. Quality is good for now.

Red Bell Pepper: Red bell peppers look to be flat to down for the week. The East continues to pull from hothouses to cover demand, while the West is relying on Mexico for supply. Quality is a mixture of fair to good for the time being.

Yellow Pepper: The yellow pepper market has eased slightly and quality is good.

Mini Sweet Pepper: Baja is finally up and running with light supply. Volume increases are expected soon, which will help ease the tight supply situation of late.

Mixed Chili Pepper: Baja's chili pepper crossings are steady, providing all varieties on a consistent basis. Domestic supply is also available in CA, but it's limited to mostly jalapenos at this point. Overall quality is good, but poblanos have challenges and may not travel well. Eastern chilies are primarily a local deal now, with product available in NC, KY, NJ, PA, and VA. No major volume, but there's enough to make a dent in demand.



EGGPLANT GA still has eggplant to offer, but quality is hit or miss; we are starting to see a little bit of product out of Michigan as well as the Carolinas, and markets are easing back. In the West, quality is outstanding, and volume is good.



CUCUMBERS Cucumber prices are up for the week. Supply has tightened up in both regions, with good demand. Mexico is transitioning to new fields for the West, while Michigan is starting off slow for the East due to weather. Quality is fair on the old crop but good on the newly-harvested crop.



ENGLISH CUCUMBERS There is a steady supply available from Georgia, Texas, and Canada. Markets are stable.



GREEN BEANS The green bean market is mixed this week. Machine-picked product out of Eastern Shore, Virginia is up, with moderate supply and good demand. Imported haricot verts are down, with moderate supply and demand.



ZUCCHINI AND YELLOW SQUASH Yellow Squash is steady to up in price for the week. Demand has slightly increased, causing a tighter supply. Quality continues to be a struggle, with heavy wind scarring. Zucchini is flat for the week. Supply is meeting current demand, and quality is good for the time being.



MELONS

Cantaloupe: Overall cantaloupe production has seen a decrease over the past week. Combined with a tremendous shift in sizing, we are anticipating smaller fruit (12/15s) to remain very limited. Good amounts of jumbo fruit are currently being harvested. Large amounts of rain and cooler weather interrupted planting schedules back in April and May; this will create some issues over the next few weeks as there will be gaps in normal daily production.

Honeydew: Honeydew production remains low overall. As with the cantaloupe, there was a shift in sizing to the larger fruit, which has caused a shortage on the smaller fruit. We anticipate steady supply over the next week, so do not expect any change in the current market.

Watermelon: Good supply crossing through Nogales and McAllen. New crop is also available out of the desert and South Georgia. Quality is outstanding and promotions are available.



HERBS

Marjoram and **Oregano** are the only two herbs that have any issues this week. With the summer heat (which is normal), these two herbs love to flower. We are trimming as many as we can, but there will be some that we miss. Please remember that there is nothing wrong with the flower and the herb is still very useable.

All other herbs are steady.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Good	USA
Basil	Steady	Good	USA/MEXICO
Opal Basil	Steady	Good	USA
Thai Basil	Steady	Good	USA/ MEXICO
Bay Leaves	Steady	Good	COLOMBIA
Chervil	Tight	Good	USA
Chives	Great	Good	MEXICO
Cilantro	Steady	Good	USA

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Dill	Fair	Good	USA
Epazote	Steady	Good	MEXICO
Lemongrass	Steady	Good	USA
Marjoram	Steady	Flowering	USA
Mint	Great	Good	USA
Oregano	Steady	Flowering	USA
Italian Parsley	Steady	Good	USA
Rosemary	Steady	Good	USA/ MEXICO
Sage	Steady	Good	USA/MEXICO
Savory	Steady	Good	USA
Sorrel	Steady	Good	USA
Tarragon	Steady	Good	MEXICO
Thyme	Steady	Good	USA
Lemon Thyme	Steady	Good	USA
Lavender	Steady	Good	USA
Lime Leaves	Steady	Good	USA



ARTICHOKES Supply industry-wide is fair. Demand is fair and prices are steady to higher.



ARUGULA Supply and quality are good.



ASPARAGUS EXTREME Markets have continued to spike since early last week and this is expected to continue. Mexico has lowered production and is forcing the west coast to rely on Peruvian production, forcing higher prices and less overall volume. Large, XL, and Jumbo will remain very tight. We expect this trend to continue over the next several weeks until new fields open up in Peru.



BOK CHOY 50# are in short supply and prices are steady.



BROCCOLI / BROCCOLI FLORETS Supply will be good the next two weeks. Quality is good.



BRUSSEL SPROUTS Supply is plentiful and quality is good.



CABBAGE (GREEN) Supply and quality are good.



CABBAGE (RED) Supply is better this week.



CARROTS Supply and quality is good. Supply is now available in Georgia.



CAULIFLOWER: We are expecting good volume for the week. Quality is good.



CELERY: Plenty of supply is available. Quality is excellent.



CORN Markets are down, with good supply available on yellow, white, and bi-color out of San Juaquin Valley. Promotions available.



CILANTRO Supply is tight this week.



FENNEL Supply on fennel will be short for the next few weeks due to frost damage and the Yuma season finishing with light supply. We will continue to see a majority of smaller fennel - 18s and 24s will remain limited.

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GARLIC: Supply is firming up and markets are active due to trade tariffs being imposed on products from China.



GINGER Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Peru and Thailand.



GREEN ONIONS Supply, quality, and demand are good.



JICAMA Storage product available--will see blemishing due to the fact it's storage fruit. Good supply available.



KALE (GREEN) Supply, quality, and demand are fair.



MACHE Availability is adequate.



MUSHROOMS Supply is currently stable, and quality is good.



NAPA Supply is tight this week.



RAPINI Supply has improved and markets are down. Quality has improved.



PARSLEY (CURLY, ITALIAN) Supply is fair and quality is good.



RADISHES Markets are firming up due to heavy precipitation and wind damage to fields.



SUGAR SNAP PEAS & SNOW PEAS
Quality is fair, the market is steady, and supply is good.



BABY SPINACH Supply and quality are good.



BUNCHED SPINACH Supply and quality are good.



SPRING MIX Supply and quality are good.



SWEET POTATOES AND YAMS WATCH LIST The sweet potato market continues to be tight after many growers were affected by Hurricane Florence in North Carolina last September. Increasing demand and heavy rains in Mississippi, Louisiana, Arkansas, and Alabama also created challenges for the other major growing regions, but luckily quality and size is still good. We will continue to see the price of sweet potatoes rise month by month over the summer until we get to next season's harvest.



ONIONS

ESCALATED The onion market has declined as all areas have had supply. It has not declined rapidly by any means, but it is likely we will see pricing remain unstable between now and August until new crop is steady. Idaho/Oregon look like they will start between the 8-15th of August, while NM and CA will start to wind down with supply around the 10th of August. Fears that the Northwest crop would be pushed 2-3 weeks behind because of the planting delays seems to have been offset by the higher temps in the growing regions over the last several weeks.



POTATOES Growers are continuing to run Burbanks exclusively through the end of the storage season in August; at that point, there will be Norkotahs out of the field. There has been little size in the Burbank crop, and the Packouts have been reduced, leading to a very strong Carton market. We will continue to see strength in the coming weeks as growers are stretching out their season until new crop becomes available.

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TOMATOES

TOMATOES - EAST

- **Rounds:** The East has several regions growing product. Quality is fair, with soft fruit being reported in the fields.
- **Romas:** TN farms have been going with romas for a little over a week. Quality has been nice and all sizes are available. Barring weather concerns, we expect to see more growers come online and get into volumes over the coming weeks. Growers in the NC mountains also have light to moderate supply.
- **Grapes:** **ESCALATED** Grape tomato pricing is higher this week. Supply remains light out of Virginia and Tennessee. Quality is fair to good.
- **Cherries:** Cherry tomato prices look to be flat for the week. Supply looks to be covering the current demand. Quality is good.
- **Organic Tomatoes:** Seeing a mixed market as we transition from Jasper to the Carolinas and Virginia. FOB prices will be up this week and quality will vary due to the transition.

TOMATOES - WEST AND MEXICO

- **Rounds:** Round tomatoes are steady to down for the week. Small-sized fruit looks to be steady, while larger sizes are showing a slight price drop. The West is supplied by Mexico and California for now.
- **Romas:** Mexico's roma crossings are relatively light this week, and quality is declining on crops in older growing areas. Northern CA farms are now into good volumes, but quality concerns (that are typical for ground-grown fruit) are rearing their ugly heads. Scarring and color issues are reducing the amount of retail-appropriate fruit, but it is being handled well in the packinghouses.
- **Grapes:** Grape tomato pricing is higher this week. Supply remains light and quality is fair to good.
- **Cherries:** Cherry tomato prices look to be flat for the week. Supply looks to be covering the current demand. Quality is good.

APPLES, PEARS, TREE FRUIT, AND STONE FRUIT



APPLES

- **RED DELICIOUS:** We will have good supply of Red Delicious apples through the rest of the season. Most grower lots are peaking on 72s to 100s. The best values and promotional items will be Premium and Exfcy # 1 Red 80s to 113s. The condition and quality are fair. Starting to see more watercore and lower shelf life on processed products. We do expect to see this be more prominent in all of the red varieties through the end of the storage season.
- **GOLDEN DELICIOUS:** Golden delicious supply in Washington is very tight and will continue to be tight through the balance of the season. There will be little supply through the end of the season, with some growers finishing up in early August.
- **GRANNY SMITH:** We will have some supply of Grannys through the balance of the season. The best values will be on Exfcy # 1 72s to 88s although the pricing on Grannys will continue to increase throughout the balance of the marketing season.
- **FUJIS:** The Fujis remain steady and are peaking on 64s to 88s with most grower lots heavy to Exfcy # 1 grade. Expect some shippers to finish up within the next few weeks, leaving a short supply to the end.
- **GALAS:** The quality of the Gala apples is very good. Most grower lots are peaking on Premium Exfcy 80s to 113s. Again, some shippers will be finishing in a few weeks while others will have product until new crop begins.
- **HONEYCRISP:** Demand and movement have been excellent. Prices have increased considerably over the past several weeks with overall pricing between \$5 to \$70 per carton on Premiums. Several shippers are finishing up this month.
- **CRIPPS PINK:** There will be pinks available through the summer months; however, some shippers will be finishing in the next few weeks. Most grower lots are peaking on Premium Exfcy 88s to 113s.



PEARS Pears: The Anjou, bosc, and red pears are all winding down. Supply mainly consists of 100s and larger, US#1, and very few fancy. Quality remains good.

STONE FRUIT

- **Apricots:** Steady supply available out of California and ramping up out of the Pacific Northwest.
- **Cherries:** Excellent supply on Bings out of Yakima and markets are falling. Quality is outstanding. Rainiers now available as well.
- **Nectarines:** Domestic nectarines are available.
- **Peaches:** Domestic peaches are available out of California, South Carolina, and Central Georgia. Light volume is being reported out of New Jersey.
- **Plums:** Market seems to be a tad lower today as more inventory becomes available.

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