

the source

Weather Update

A strong high pressure ridge remains in charge out West through the weekend with temperatures near the coast continuing in the upper 70s with mid 90s in the inland valleys. The interior regions of the Central Valley will see very warm triple digit temperatures 5-10 degrees above seasonal averages. Monsoonal moisture also remains but the chance of afternoon showers and thunderstorms will be concentrated in the hills while the valley floor is expected to remain dry.

In the Southwest and Northern Mexico temperatures remain unseasonably warm under the large high pressure ridge. Interior regions remain in the triple digits with mid 80s along the coast. Monsoonal moisture will bring a good chance of showers through the weekend.

The Southeast and Mid-Atlantic regions will continue with scattered showers and thunderstorms, mainly in the afternoon while maximum temperatures are expected to be near normal.

Market Alerts

Berries (Raspberries)

Demand exceeds supply. Supply remains extremely limited and this supply gap looks to remain through the month of July and possibly into August.

Berries (Strawberries)

Quality issues present due to excessive heat and humidity in California growing regions.

Grapes (Green)

Excessive heat curtailing harvest.

Bell Peppers (Western)

Because of recent hot weather, western bell peppers are exhibiting some quality issues, sun scald, blemishing, and discolorations; this is industry wide in the west. Weather cooperating we should see quality improving in the next couple of weeks.



Freight Information



Truckin' Along

Look for trucks in CA to be tight the balance of the week due to the 4th of July holiday. Idaho and Washington trucks remain steady. Be aware of the fires in Wenatchee, WA area which is affecting some of the apple sheds in the area. Fuel prices dropped slightly again this week. Crude Oil remains steady at 58.24 per barrel.

A Peek at Peak Seasons

Berries (Strawberries)

Production volume estimates are beginning to decrease as we move past the Salinas / Watsonville peak production season we've experienced over the past several weeks.

Transitions and Temperatures

Berries (Blueberries)

Michigan began picking this week. Indiana started with minimal volume but rains have delayed harvesting early this week. Georgia has ended most major production and North Carolina is decreasing as well.

Berries (Blackberries)

Georgia blackberries are winding down for the season and volume will continue to decline.

Citrus (Lemons)

Demand exceeds supply. Summertime demand and lighter production caused by the California drought. Expect lighter supplies throughout the summer and into the fall.

U.S. Regular Gasoline Prices* (dollars per gallon)

[full history](#)

	06/08/15	06/15/15	06/22/15	Change from	
				week ago	year ago
U.S.	2.780	2.835	2.812	↓ -0.023	↓ -0.892
East Coast (PADD1)	2.691	2.742	2.729	↓ -0.013	↓ -0.938
New England (PADD1A)	2.743	2.788	2.806	↑ 0.018	↓ -0.955
Central Atlantic (PADD1B)	2.751	2.803	2.786	↓ -0.017	↓ -0.952
Lower Atlantic (PADD1C)	2.630	2.683	2.663	↓ -0.020	↓ -0.924
Midwest (PADD2)	2.677	2.794	2.743	↓ -0.051	↓ -0.950
Gulf Coast (PADD3)	2.536	2.593	2.574	↓ -0.019	↓ -0.920
Rocky Mountain (PADD4)	2.758	2.785	2.788	↑ 0.003	↓ -0.818
West Coast (PADD5)	3.377	3.334	3.329	↓ -0.005	↓ -0.682
West Coast less California	3.008	3.030	3.069	↑ 0.039	↓ -0.786



Commodity Updates



APPLES

Michigan is packing Red Delicious and will pack through July they think. They are peaking on 100s and larger and supplies of small fruit are relatively short. The quality has been fair due to lighter pressures. Washington Red Delicious are still being quoted steady but the price-flex for 88s and larger is still there. Most packers are still peaking on 88s and larger in the premium and Washington extra #1 grades with only limited supplies of 100s and smaller. Golden Delicious are still mostly steady on all sizes. 125 & 138 and Golden are still more limited than the other sizes and are priced at a premium. Granny-Smith are also mostly steady and are still peaking on 72s and larger. Supplies of Granny 100s and smaller remain short. Fujis are steady and continue to peak on the larger sizes. Fuji volume is lower as the end of the season approaches and small Fujis are especially short. Galas are steady and are still peaking on 88/100s. The Gala volume is also down as the end of the season is getting close. Imported Cripps-Pink (Pink Ladys) are still available on both coasts and the markets are steady to slightly lower. They are still peaking on 70s and 80s.

ASPARAGUS

This market is stronger. Supplies out of Peru have tightened up a bit but product is available. This region is producing heavy to standard and large sizing. The pack sizes out of Mexico continues to produce good quantities of jumbo packs. All sizing is readily available and demand has picked up. Salinas' production is finished. Overall, the quality has reported to be strong in all of the growing areas. Pricing looks to be stronger throughout the week.

AVOCADO

California: We are past peak volume for the season and lower volumes are come out of the fields. Good demand leading into Independence Day has cleaned up supplies. It will take a couple of weeks to regain these supplies. Market looks to be very active for a while before settling out.

Mexican: Mexican production dipped down last week due to rains in growing areas, and this has really left a shortage this week that will roll over into next supplies. Old crop is winding down and look for supplies to dip by 25 percent after the first week of July. Smaller fruit is limited coming out of Mexico and we are seeing great upward market pressure on 60's and 70's as well as rises on 48's and larger fruit.

BELL PEPPERS

Eastern: The pepper market continues to be extremely tight. The Carolinas and New Jersey are the only ones working pepper right now and, due to it still being somewhat early for them, volume is light. Michigan is not expected to kick in until mid-late next week. This market will remain at the higher levels through the weekend and, most likely, the front of next week.

Western: Green bell and colored bells are showing quality issues because of recent hot weather the growing areas have experienced the last week or so. Production has slowed and lack of availability has pressed markets upwards. We anticipate some relief as other growing areas will come online soon (approx two weeks). Quality because of the recent heat will be fair to good.

BERRIES (BLACKBERRIES)

We have seen interruptions in California supply over the past few weeks and again this week. Supply should be increasing week over week all the way through August however some shippers are seeing a supply gap that could last later into the summer, with really good volume coming on by August. Availability has been day to day, shipper to shipper in CA. Although, the recent heat we've experienced has actually helped to bring on some better volumes of ripe fruit. Georgia season is winding down and with lower volumes harvested, availability will now continue to decrease. Oregon volumes have been limited as they experience a short gap in between varieties.

BERRIES (BLUEBERRIES)

Supply continues to be abundant with good volume and quality coming from several growing regions. Demand and markets remain steady with promotional opportunities available. This is an excellent time to promote fresh blueberries!

BERRIES (RASPBERRIES)

Raspberries are very limited out of CA. Many factors have led to this shortage. The crop started early out of CA due to the unseasonable warm winter and lack of rainfall. The growth then slowed down due to cooler temps in May and June. Additionally, the current harvest to pruning cycles are keeping us in a demand exceeds supply situation. While the volumes should typically increase as we move through the summer, the current supply gap looks to be an issue all the way through July and even limiting availability into August. The recent heat wave may only further decrease supply as warm weather will cause the plants to hold onto their fruit decreasing the amount of fruit being picked.



Commodity Updates



BERRIES (STRAWBERRIES)

Record setting high temperatures were recorded in several inland areas yesterday, the hottest spots reaching up to 110* and coastal areas topping out in the mid 80s. This heat will begin to taper off as we head into the weekend and temperatures will level out closer to average by next week. Along with the heat, we are experiencing increased humidity and this will be present into this weekend as well. Quality issues are being reported industry wide and affecting all labels. The warm weather has brought on ripe red fruit which increases the amount of bruises and soft spots when this fruit is being picked and packed. The sunshine and heat has also colored-up the fruit before it could reach mature sizing so you will notice smaller berries than normal in the clamshells. Due to the humidity and the heat, we may also see increased presence of mildew. Bruising, white/soft shoulders, overripe, soft, mildew are among the quality issues being reported on the daily inspections. It will be important to communicate and adjust expectation for this current period. Additionally, cold chain must be managed precisely to avoid the chances of mold popping up when the fruit is exposed to warm temperatures.

BROCCOLI

This market was expected to be stronger, but the market did not respond. Overall, most shippers are steady. Pricing is competitive throughout the industry. The main production continues to be out of the Salinas Valley. The Southern California region will have moderate production throughout the week. Production out of Mexico has eased up. Texas is light in production. Good quality continues to be reported for now in all the growing regions.

CARROTS

Bakersfield crop is now in full swing on production. Weather has been warm and size is coming on and we're seeing much better production of Jumbo carrots.

CAULIFLOWER

This market is softer. Demand has fallen off. The quality on this commodity, overall is being reported as good, with only slight discoloration sporadically being reported. Insect damage is minimal. For now however shippers are looking to keep coolers clean daily with their inventories. Offers are being listened to so promote as much as possible. Expect moderate to good supplies for the rest of the week. There will be price gaps of two-three dollars amongst the different shippers.

CELERY

Supplies in Oxnard is finished. If product is needed down south, Santa Maria is an option. The Salinas Valley is producing plenty of celery. Pricing is very competitive in the industry. Large sizing is the most readily available. Small sizing is commanding a higher price. Good, strong quality exists with all shippers. This is a good item to promote, especially on large sizing.

CHERRIES

The market on cherries is in a state of flux. The volume on Rainier cherries is dropping and the price on these is strengthening rapidly. The dark sweet red cherries are in their last peak volume of the season and this market is adjusting downward. This will last for one more week at which time volume on all varieties will tail off. The Washington cherry deal will be finishing about the end of the third week of July.

CITRUS (LEMONS)

Crop is peaking on 140s and smaller. Demand is exceeding supplies on all sizes and grades of fruit. Very good demand and drought conditions in growing areas means production of less fruit and no size growth are the major factors for the demand exceed conditions.

CITRUS (LIMES)

The lime market is steady on all sizes. The prices are the same on all sizes whereas in the past the spread has been several dollars. Growers continue harvesting less due to low market conditions. Lower prices have helped spur demand on all sizes. The overall quality is very good on the crop that is being harvested. Growers are starting to get into old crop limes now. We should start seeing thinner skin with lighter color in some lots coming up.

CITRUS (ORANGES)

California Navel crop is coming to it's end. Still a few left and peaking on 72s/56s. California Valencia oranges are going with good volume on 72s, 88s, 113s, 138's. Quality on Valencias is very good.



Commodity Updates



CUCUMBERS

Eastern: With Georgia finished up on cukes now, product has become very tight. Cool temperatures and heavy rains in Michigan/Ohio have delayed that deal and North Carolina is typically not ready for cucumbers this time of year. By the weekend, more product should become available. But until then, volume is extremely limited and quality is poor as a result of wet weather.

Western: Market is steady although high FOB's. Production crossing through Nogales is basically done. Because of some growing districts wrapping up in Mexico supplies are very light and in a demand exceeds situation. Baja California is shipping with good quality but their supplies are not meeting current demand. We're anticipating some relief as some new growers will be coming online.

EGGPLANT

Eastern: The eggplant market remains steady and demand is light this week. Georgia will continue for another 7-10 days with eggplant, unless the high temperatures cause growers to pull the plug sooner. Michigan is still 10-14 days away but volume is decent out of North Carolina and New Jersey.

Western: California is the main source of eggplant in the west. Current availability is keeping up with current demand. Markets continue steady. We may see a slow down on some production due to transitions and recent hot weather. We anticipate the market to go up soon.

GRAPES

Green: The green grape market is strong. Most shippers in the Arvin district have had to delay harvest due to the excessive heat of recent days. When temperatures run over 100 degrees the vines shut down and the grapes do not produce enough sugar. This situation should improve with cooler temps predicted for early next week.

Red: The red seedless grape market is steady with good supplies fruit. Sizing is running heavily to the medium/large grapes. Volume in all areas of the Central Valley of California is picking up daily. The rain that hit the Arvin district today should have little to no effect upon the quality.

GREEN ONIONS

A steady market continues to be the story on this commodity. Demand is minimal. Expect supplies to be plentiful throughout the week out of Mexico. Supplies continue to exceed demand. All sizing is available. Light supplies are being harvested in Salinas. The heavier abundance of product is coming in small and medium size packs.

ICEBERG LETTUCE

This market has remained unchanged. There continues to be a gap of two to three dollars in the marketplace. Some defects continue to be reported upon arrivals. These defects include puffiness, insect damage and ribbing. The weights on palletized lettuce are ranging from 38-44 pounds. Salinas and Santa Maria are the two main growing regions at this time. Production in Santa Maria is minimal, but some is available. Salinas will have moderate supplies. Demand is expected to be moderate at best for the rest of the weekend. Labor continues to be an issue for multiple shippers as workers tend to flee for a few weeks during this period of the year.

LEAF LETTUCE

The market on romaine has eased up with many suppliers. Demand has quieted down and shippers are looking to keep inventories down for the weekend. Defects on romaine continue. These defects include tip and wind burn, dehydration and mildew. Yields are down, but demand overall is off. The weights on cartons are averaging 31-37 pounds. Chopped romaine continues to show pinking upon arrivals. Romaine hearts continue to be on escalated pricing. Fringe burn and insect damage continues to be seen on red and green leaf. Butter supplies are light to moderate.

MELON (CANTALOUPE)

The desert continues to have good demand for melons. Overall supplies are not as heavy as they were during their peak production a few weeks ago. 9's are now easier to find which is a good thing. The peak size is mainly 15ct currently. Overall quality is good with some growers in the Brawley, Holtville and El Centro areas experiencing lesser quality. Maricopa and the San Joaquin Valley have very good quality. The "west side" is set to mainly start the week of July 6th with but a few growers have started this week with small volumes. The market is steady on 9's, 12's and 15's.

MELON (HONEYDEW)

The desert supplies look to be steady this week with light supplies of 5's. The domestic dewes have excellent quality and are commanding a premium compared to the product from Mexico. The quality on Mexican and domestic dewes is very nice. The peak size is 8ct on the domestic dewes coming in right now. Supplies out of Mexico remain at low levels with 6s and 8s being the main sizes coming in. The San Joaquin Valley has started shipping dewes in a light way this week with 8's being the peak size.



Commodity Updates



MELON (WATERMELON)

Production crossing through Nogales is done. Most product coming in bins cartons packed upon request. Some light supplies are coming from Southern California, Southern Texas, and Georgia. With impending 4th of July pulls, watermelons are lighter in availability and with higher FOB's, Demand Exceeds.



ONIONS

Supplies of Yellow onions out of California are peaking on Colossal and larger with very few medium yellow being packed. Market is steady on Jumbo's and larger with a firm market on mediums. The red onion market is active as supplies out of New Mexico are light putting more pressure on supplies out of California. This should last into the middle of next week when supplies will improve out of New Mexico. Some shippers out of New Mexico are starting to gap on Yellow onions as they transition from over winter onions in to direct seeded onions. This could again put more pressure on California for supplies for yellow onions. The market has not reacted yet, but could as this week moves on. Quality out both areas are being reported as good. Walla Walla and Vidalia Sweets are available. Market is active with the 4th of July pull going in full swing.



PEARS

Washington continues to ship D'anjou pears and they are peaking on US#1 80-100s. Most packers are limited on Us#1 110s and smaller and all sizes in the fancy grade. The D'anjou market is steady. Washington will have D'anjou pears through July. For imports we have Chilean Packhams and Bosc being imported on both coasts. Both the Packhams and the Bosc are steady to lower. The Packhams are peaking on 100s while the Bosc are peaking on 100/110s. Bartlett pears are set to start in California in a small way next week.



POTATOES

Idaho: Market on large cartons (40-60) has come off slightly last week but looks to have stabilized. Demand is light. All other sizes are holding steady. Trucks have good availability with reasonable rates. Roughly six weeks left before new crop. New crop has potential to be a week to 10 days ahead of last year. Quality is good to fair.

Washington: Market on the large cartons has make a slight downward correction due to the Idaho market coming off. All other sizes are steady. Quality is good.

Colorado/Wisconsin: Market is steady on all sizes and packs. Some of the smaller sheds have finish for the season which has tighten supplies slightly. New crop looks to ahead of schedule by a few days earlier than normal. This should creating a seamless supply transition between storage and new crop. Large cartons are limited in supply. Quality is being reported as good.



COLORED POTATOES

Supplies will start to transition from Bakersfield to Stockton California the week of July 13th. Bakersfield, California is packing red, white, and gold potatoes. All colors continue to peak on A-size and the markets are steady for all sizes. All colors have better availability of premium and baker size. The quality has been good. Texas is just getting started with reds and golds and both colors are steady. The Texas reds are peaking on A-size and the golds are heavier to B-size. Alabama is steady on reds and they are peaking on A-size. The quality and maturity are being reported as good. They do not have whites but will have golds in approximately three weeks. North Carolina continues to pack whites and reds and they are both heavy to A-size. The quality is being reported as good. They will have golds and more volume of reds later in the week.



SQUASH

Eastern: Georgia is finished on squash but temperatures in the Norther growing regions have just been too cool and wet to produce any volume. This commodity remains extremely tight going into the weekend. However, with temperatures warming up in the next few days, we should see a flush of product by middle of next week.

Western: Italian and yellow squash are higher. Because of recent weather some production has slowed down and demand has pressed markets up. Currently a demand exceeds market.



STONE FRUIT

The market on all stone fruit is about steady depending upon the size quoted. Peaches and nectarines are peaking with large tray packs and shippers are promoting these with some aggressive pricing. Plums are peaking on the smaller 70's to 50's; these are selling at a strong discount to the larger sizes. Apricots are winding down out of the California growing regions and this market is firm across all sizes. Quality on all is being reported as excellent.



Commodity Updates



TOMATOES

Eastern:

Rounds/Romas - The East is having its share of difficulties during this years transition. From high temperature to lack of labor the supply is not meeting demand. Buyers are starting to look out west for product. Georgia and Virginia have begun to harvest and they are currently seeing decent fruit. With the heat issues the Carolinas are wrapping up earlier than anticipated. This is going to cause a push to the West and we should see both markets rise in the coming weeks. Although Roma pricing may have a chance to settle with product becoming available in Tennessee and Alabama in a week or so.

Cherry/Grape - The east is still relying heavily on the west for volume. Virginia should be coming into some volume in a week that will steady the market a bit. The west is in good supplies and the east will be increasing in their supply with smaller operations having product available shortly.

Eastern:

Rounds - Product in Eastern Mexico remains in decent supply and quality for the next couple weeks. In the San Joaquin Valley production is peaking and should remain steady for the time being. Production in Northern Baja continues to increase in supply and quality is good. With temperatures rising in the west we should keep our eyes open for a possible gap/shortage situation in about a month.

Romas - The Northern and Central Mexico growing areas are in light supply with good quality. Northern Baja volume is continuing to increase and looks to remain steady with good quality. California's Central Valley has light supplies with increasing volumes and good quality.

Cherry/Grape - Product crossing into Southern California from Baja Mexico remains steady with some improvement in quality. Central Mexico is still carrying the Midwest and some Eastern demand with good quality and volume. Production in California is in good quality and supply. Heat may become a factor next week but production should remain steady.



Commodities at a Glance



Apples	Market	Quality
Coopersville/Belding/Sparta, MI	Steady	Fair
Wenatchee/Yakima, WA and Hood River, OR	Steady	Good
Chile	Steady	Good

Asparagus	Market	Quality
Coborca, Mexico	Higher	Good
Ica, Peru to Trujillo	Higher	Good

Avocado (California)	Market	Quality
Oxnard/Ventura, CA	Higher	Excellent
Temecula/Escondido, CA	Higher	Excellent

Avocado (Mexico)	Market	Quality
Michoacan, Mexico	Higher	Good

Bell Peppers (East)	Market	Quality
Henderson / Buncomb County, NC	Higher	Good

Bell Peppers (West)	Market	Quality
Oxnard, CA	Steady/Higher	Fair
Salinas Valley, CA	Steady/Higher	Fair

Berries (Blackberries)	Market	Quality
Salinas, CA	Steady	Good
Watsonville, CA	Steady	Good
Santa Maria, CA	Steady	Good
Sheridan, OR	Steady	Good
Alma, GA	Steady	Good

Berries (Blueberries)	Market	Quality
Central Valley, CA	Steady	Good
Georgia	Lower/Steady	Fair
North Carolina	Lower/Steady	Fair
Oregon	Steady/Higher	Good
Mossyrock, WA	Steady/Higher	Good
Hammonton, NJ	Steady	Good
Demotte, IN	Steady	Good
Grand Junction, MI	Steady	Good
Pitt Meadows, BC	Lower/Steady	Good

Berries (Raspberries)	Market	Quality
Salinas, CA	Steady/Higher	Good
Watsonville, CA	Steady/Higher	Good
Santa Maria, CA	Steady/Higher	Good
Oxnard, CA	Steady/Higher	Good
South Carolina	Steady	Good

Berries (Strawberries)	Market	Quality
Salinas Valley, CA	Steady	Fair
Watsonville, CA	Steady	Fair
Santa Maria, CA	Steady	Fair

Broccoli	Market	Quality
Celaya Guanajuato Mexico	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good
Celaya Guanajuato Mexico	Steady	Good

Carrots	Market	Quality
Bakersfield/Santa Maria, CA	Steady	Excellent

Cauliflower	Market	Quality
Oxnard/Santa Maria, CA	Lower	Good
Salinas Valley, CA	Lower	Good



Commodities at a Glance



Celery	Market	Quality
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good

Cherries		
Yakima, WA	Steady/Higher	Good
Wenatchee Valley, WA	Steady/Higher	Good

Citrus (Lemons)		
Merced/Bakersfield, CA	Steady	Good
Oxnard/Ventura, CA	Steady	Good

Citrus (Limes)		
Veracruz, Mexico	Steady	Excellent

Citrus (Oranges)		
Merced to Bakersfield, CA	Steady	Excellent
Riverside, CA	Steady	Excellent

Cucumber (Eastern)		
Henderson / Buncomb County, NC	Higher	Fair
Seneca / Summit County, OH	Higher	Poor
Ottawa / Kent / Berrien County, MI	Higher	Poor

Cucumber (Western)		
Southern Baja California Sur, Mexico	Steady	Good
Northern Baja California Norte, Mexico	Steady	Good

Eggplant (Eastern)		
Lee / Grady County, GA	Steady	Fair

Eggplant (Western)		
Fresno, CA	Steady	Good
Southern CA	Steady	Good

Grapes (Green)	Market	Quality
Arvin, CA	Higher	Good

Grapes (Red)		
Arvin, CA	Steady	Excellent
Delano, CA	Steady	Excellent

Green Onions		
Mexicali, Baja	Steady	Good
Salinas Valley, CA	Steady	Good

Lettuce Iceberg		
Oxnard/Santa Maria, CA	Steady	Fair
Salinas Valley, CA	Steady	Fair

Lettuce Leaf		
Oxnard/Santa Maria, CA	Lower/Steady	Fair
Salinas Valley, CA	Lower/Steady	Fair

Melon (Cantaloupe)		
Maricopa, AZ	Steady	Excellent
Holtville, CA	Steady	Good
Firebaugh, CA	Steady	Excellent

Melon (Honeydew)		
Maricopa, AZ	Steady	Excellent
Firebaugh, CA	Steady	Excellent
Hermosillo, Mexico	Steady	Excellent

Melon (Watermelon)		
Phoenix, AZ	Higher	Good
Coachella Valley	Higher	Good
McAllen, TX	Higher	Good



Commodities at a Glance



Onions	Market	Quality
Huron/Metler, CA	Steady/Higher	Good
Las Cruces, NM	Steady/Higher	Good

Pears		
Wenatchee/Yakima, WA and Hood River, OR	Steady	Good

Potatoes		
Hamer/Rupert, ID	Steady	Fair
Quincy/Hermiston, WA	Steady	Good
Eastern Colorado	Steady	Good
Plover/Bancroft, WI	Steady	Good

Potatoes (colored)		
Bakersfield, CA	Steady	Good

Squash (Eastern)		
Seneca / Summit County, OH	Higher	Fair
Ottawa / Kent / Berrien County, MI	Higher	Fair
Henderson / Bucomb County, NC	Higher	Good

Squash (Western)		
Santa Maria, CA	Steady/Higher	Good
Southern Coast CA	Steady/Higher	Good

Stone Fruit		
Coachella Valley, CA	Steady	Excellent

Tomatoes (Eastern)		
Charleston, SC	Steady/Higher	Good
Eastern North Carolina	Steady/Higher	Good

Tomatoes (Western)		
Coachella Valley, CA	Steady	Good
Southern San Joaquin Valley, CA	Steady	Good
Northern Baja California Norte, Mexico	Steady	Good

