

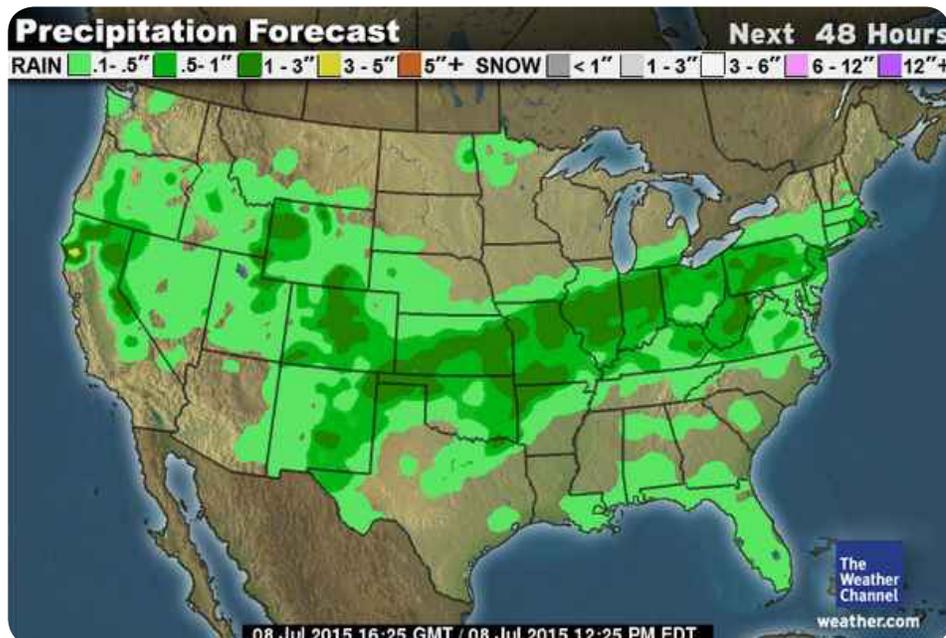
the source

Weather Update

The cool down out West continues this week as an upper level low pressure system moves through California. This deep low system will bring a good chance of drizzle near the coast keeping temperatures in the 60s into the weekend. Inland regions will reach the 70s with upper 80s in the warmest interior valleys. A warming trend begins over the weekend as high pressure returns next week on the West Coast. Monsoonal moisture will continue to bring a chance of afternoon showers mainly in the higher terrain.

The Southwestern regions cool to below seasonal averages, generally in the upper 90s as the low passes to the north. Coastal Baja will cool to the 70s with 80s inland, warming late this week as high pressure returns. Monsoonal moisture coupled with the deep low passing to the north will bring a decent chance of showers through the week.

The Southeast regions will continue to see scattered showers, mainly in the afternoon. A couple of weak fronts move through this week with temperatures generally in the upper 90s. Parts of the Mid-Atlantic region are under flash flood threat as strong thunderstorms are possible through Friday.



Market Alerts

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.

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.

A Peek at Peak Seasons

Cherries

Peak season on cherries is over and volumes will steadily decline for the next 2 weeks.

Berries (Blueberries)

New Jersey is in peak production season!



Freight Information



Truckin' Along

Trucks in California should hold steady the balance of the week. Washington and the Northwest should be steady as well. Crude oil remained steady and is currently 51.77 per barrel. Fuel prices remained steady again this week with CA pricing at 3.142 per gallon and the national average at 2.832.

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

[full history](#)

	Change from				
	06/22/15	06/29/15	07/06/15	week ago	year ago
U.S.	2.859	2.843	2.832	↓ -0.011	↓ -1.081
East Coast (PADD1)	2.959	2.954	2.938	↓ -0.016	↓ -1.040
New England (PADD1A)	3.085	3.071	3.060	↓ -0.011	↓ -1.038
Central Atlantic (PADD1B)	3.102	3.094	3.073	↓ -0.021	↓ -0.996
Lower Atlantic (PADD1C)	2.824	2.823	2.810	↓ -0.013	↓ -1.072
Midwest (PADD2)	2.746	2.731	2.724	↓ -0.007	↓ -1.138
Gulf Coast (PADD3)	2.755	2.730	2.712	↓ -0.018	↓ -1.090
Rocky Mountain (PADD4)	2.799	2.776	2.785	↑ 0.009	↓ -1.124
West Coast (PADD5)	3.097	3.068	3.069	↑ 0.001	↓ -0.998
West Coast less California	3.007	2.978	2.978	0.000	↓ -1.007
California	3.170	3.141	3.142	↑ 0.001	↓ -0.993

A Peek at Peak Seasons

Berries (Strawberries)

Production volume estimates are continuing to decline as we move past the Salinas / Watsonville peak production season..

Transitions and Temperatures

Potatoes

Washington will start packing new-crop russet Norkotahs in approximately two weeks. Colorado will pack new-crop russet Norkotahs on August 1st

Apples

Most California apple shippers will begin to pack Galas around August 1st.

Pears

California will start to pack Bosc pears on or around July 24th. Washington will start packing Bartlett pears between late July and early August.

Potatoes (colored)

Eastern Washington will start packing red and gold potatoes sometime around August 1st.

Minnesota is scheduled to start packing new crop around the same time.

Berries (Blackberries)

Georgia has ended most major production and will continually decline to season end.

Berries (Blueberries)

Georgia and North Carolina production has declined significantly as those seasons come to an end!



Commodity Updates



APPLES

Michigan is packing Red Delicious and they will pack through July they say. They are still peaking on 100s and larger and supplies of small fruit remain light. The quality has been fair due to lighter pressures. One supplier in California has started packing gala apples and they are peaking on 100/113's with only light supplies of 80's and larger. This early fruit is high in color.

Washington Red Delicious are still being quoted steady but the price-flex for 88s and larger is still there. Most shippers are still peaking on 88s and larger in the premium and Washington extra #1 grades. Golden Delicious are mostly steady on all sizes. 125 & 138 and Goldens are still more limited than the other sizes. Granny-Smith are mostly steady and are still peaking on 72s and larger. Supplies of Granny 100s and smaller remain short. Fujis and Galas are cleaning up quickly and supplies are limited, most shippers have holes in their manifests. The markets for both varieties are active.

ASPARAGUS

This market is steady. Product from Peru has picked up coming into Miami. Jumbo packs continue to be light in availability. Supplies are heavy to standard and large. Good supplies continue out of Mexico. This product can be loaded in Salinas or LA. Standard and large have the best availability. There are decent supplies of jumbos. All sizing is readily available. Overall, the quality has reported to be strong in all of the growing areas. Pricing looks to be steady for the rest of the week.

AVOCADO

California: We are past peak volume for the season and lower volumes are beginning to come out of the fields. California harvest volume is expected to dipped a little again this week, then dip down next week hold fairly steady through July before gently declining thereafter. Peak sizing on 60s / 48's. Very good demand is keeping supplies on all sizes tight. Quality and flavor are both excellent.

Mexican: Production dipped down last week due to rains in growing areas, and this has really left a shortage this week. Old crop is winding down and look for supplies to dip by 25 percent this week. The Flor Loca crop from Mexico will begin this week. 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 for at least a couple of weeks. This market will remain at the higher levels through the weekend.

Western: Green and colored bell pepper continue demand exceeds. Production has slowed and lack of availability has pressed markets upwards. We anticipate some relief as other growing areas will come online soon (approx one week). 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. 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)

Supplies continue to be abundant with good volume and good quality coming from several growing regions. Demand and markets remain steady with promotional opportunities available. This is an excellent time to promote fresh blueberries! Best deals will be in the larger volume packs.

BERRIES (RASPBERRIES)

Raspberries are 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 tight supply situation.

While the volumes should typically increase as we move through the summer, the current supply gap may be an issue all the way through July. Crop should then come on quickly and be at peak volume by mid-August.



Commodity Updates



BERRIES (STRAWBERRIES)

Recent warm weather coupled with humidity is raising the occurrence of quality issues 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 have 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, misshapen 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

The market has remained unchanged on bunched product as well as crowns. Pricing is very competitive throughout the industry. Shippers are listening to offers so promote this commodity. The main production is out of Salinas. The Southern California region will have moderate production throughout the week. Production out of Mexico is light to moderate. Texas is light in production. Good quality, overall continues to be reported 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 unchanged. Demand is off and shippers are listening to offers. Pricing is competitive, overall. The quality on this item is being reported as good, with only slight discoloration sporadically being reported. Insect damage is minimal. Expect moderate to good supplies for the rest of the week. There are still a few price gaps, but overall these gaps have closed considerably.

CELERY

Santa Maria continues to have production if needed in the southern California region. The quality is good, overall. The Salinas Valley has lighter availability but all orders are being covered in full. This market is firm. The field reports indicate excellent quality from most suppliers. Pricing continues to be competitive. Large sizing is the most readily available. Small sizing is commanding a higher price.

CHERRIES

The market on red cherries continues to settle as shippers discount pricing to clean up last weeks inventories. This should be temporary as volumes at harvest are significantly lower for the last 10 days of the season. Pricing has been especially aggressive on the smaller sizes as shippers try to spark demand.

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 continues to be steady on all sizes. Growers continue harvesting less due to low market conditions. Lower prices have helped 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 Valencia oranges are going with good volume on 72s, 88s, 113s, 138's. Demand is improving on 88's/113's/138's and seeing prices firm up. Quality on Valencias is very good.

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 only just now getting going. By the weekend, more product should become available, bringing the market down a bit. But until then, volume is 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 seeing some additional acreage coming online from Baja California and is offering some relief in FOBs



Commodity Updates



EGGPLANT

Eastern: Eggplant in the east is scarce this week. Georgia will continue for a few more days with eggplant, and Michigan is far from ready. That leaves the Carolinas and New Jersey which are currently not producing enough eggplant to meet market demands. This market will continue to trend upward in the coming days.

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: Green seedless grapes are slowly becoming more available as the cooler weather promotes better sugar. We expect to see volume on these to increase steadily over the coming week with an easing in the market projected for next week. Quality is generally reported as very good.

Red: The red grape market is about steady with some aggressively lower pricing on small grapes. Although promoted as medium / large the discounts on price are for berry sizes in the 9/16 - 11/16 range. This has led to a split market with the larger, scarcer fruit, selling at a premium to the smaller sized fruit. The industry as a whole is currently limited on availability of their larger sized grapes.

GREEN ONIONS

This market is steady. Demand is non-existent. Expect supplies to be plentiful throughout the week out of Mexico. Supplies will likely 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. The weights on palletized are averaging 43-47 pounds. Defects that have been reported include slight misshapen heads, light insect and mildew. The temperatures have been warm in all the growing regions. 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 throughout the week.

LEAF LETTUCE

The market on romaine is steady. There is a pricing gap in the industry however. Tip and fringe burn is causing lower yields for some suppliers. Demand is off. Defects on romaine also include insects, dehydration and mildew. The weights on romaine cartons are averaging 32-37 pounds. Hearts have better availability due to lack of business. Yields continue to be lighter with many suppliers but all orders are being filled. Chopped romaine continues to show pinking upon arrivals. Fringe burn and insect damage continues to be seen on red and green leaf. Butter supplies are moderate.

MELON (CANTALOUPE)

The San Joaquin Valley aka "The West Side" has started and is where all of our orders are loading. Maricopa was our last area in the desert and they have finished harvesting. Lope 9's are easier to buy which is a good thing for us. The peak size is mainly 15ct. The West Side has very good quality. The current market is steady to lower on 9's and 12's. The market on 15's is steady for now at the current level.

MELON (HONEYDEW)

The San Joaquin Valley has started and is supporting the current demand. The desert supplies are winding down and have light supplies of 5's. The new crop dews have excellent quality and sugar levels. The peak size is 6ct on the dews coming in right now of the. Supplies out of Mexico remain at low levels and will probably be completely finished this week.

MELON (WATERMELON)

Most product coming in bins cartons packed upon request. Some light supplies are coming from Southern California, Southern Texas, and Georgia. Market continues demand exceeds.

ONIONS

Huron, California is packing all colors but some shippers are gapping so supplies are questionable. New Mexico also had rain last night so expect the shippers that have product to push the market a little. The packers that are running are heavier to jumbo and larger yellows and have limited supplies of mediums and pre-packs. Reds and whites are both available in limited quantities and both colors are heavier to jumbos. The quality has been good.

New Mexico had limited supplies anyway as some shippers are gapping to a transition between transplants and direct-seeded product, and last nights rain won't help. Just like California, expect the shippers who have product to push the market. Most packers here



Commodity Updates



ONIONS (CONTINUED)

also have jumbo and larger yellows with limited supplies of mediums and smaller. Reds and whites are available but supplies are spotty and the markets are both strong. The quality is good

PEARS

California is packing Bartlett pears around the Lodi area. They are peaking on US#1 80/90/100's. They also have Stark Crimson pears and are producing 35-55 size half cartons. Washington still has D'anjou pears and they are peaking on US#1 80-100s. Most packers are limited on anything smaller than a US#1 110 and all sizes in the fancy grade. The D'anjou market is steady. Washington will have D'anjou pears through July. The Chilean pears are cleaning and should be finished by the end of the week.

POTATOES

The potato market out of all areas (Idaho, Washington, Colorado and Wisconsin) is steady on 90ct and smaller at low trading levels. Larger cartons 70ct and larger have adjusted down slightly but are still relatively high. This trend should continue until new crop starts up in late July to early August. Quality is still being reported as good.

COLORED POTATOES

Bakersfield, California continues to pack red, white, and gold potatoes. All colors continue to peak on A-size and the markets are steady but some suppliers are coming to the end of their season so we should see a stronger market. Gold supplies remain light. The quality has been good.

Stockton, California has started packing reds and golds as well as a few whites. All are producing mostly A-size and the quality is being reported as good.

Muleshoe, Texas is packing red potatoes and a few golds and they are both peaking on A-size. The demand has been strong and the market is high because of it.

Alabama is steady on reds and they are also on A's. They have better availability in bagged product but cartons are available. They will have golds in approximately eleven days.

Camden, North Carolina is packing all colors but they have more whites and reds available, gold supplies are limited. All colors are heavy to A-size. The quality is being reported as good.

Virginia is packing all colors and they also have better availability on reds & whites with light supplies of Golds. All are peaking on A-size.

SQUASH

Eastern: Georgia is finished on squash but recent temperatures in the Northern growing regions have just been too cool and wet to produce any volume. This commodity remains extremely tight. However, with temperatures warming up now, we should see increased volume by early next week.

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

STONE FRUIT

Peaches and nectarines are readily available with sizing continuing to run heavy to the larger sizes. We have experienced some small varietal gaps in the white peaches and nectarines recently but with little effect on the overall market. Demand is about steady. Apricots are finishing strongly in California with some growers done and other still in their final weeks of the Brittany Gold's. Demand continues to be very good as supplies diminish. Plums, both black and red varieties, are readily available with sizing heavy to the smaller 50 to 70 series.

TOMATOES

Eastern:

Rounds/Romas – Weather is still an issue in the East and is causing harvest delays in the Tennessee and Virginia regions. Buyers are looking west to fill product needs. Volume is low but looking to increase if Tennessee and Virginia can start harvesting next week. Market is higher but should settle in the next 10 days.

Cherry/Grape – Virginia has started harvesting cherry toms and they are seeing large fruit with decent volume. The East is still in a supply does not meet demand position but the gap is closing. The grape toms are yielding higher than expected. This should help bring the price down. The current supply is steady and should cover demand.

Western:

Rounds – Continued pressure from the East for volume the West market has tightened up a bit. Central Mexico remains steady in supply and we should start seeing some smaller fruit crossing. The weather continues to be a wild card in the San Joaquin Valley. Weather permitting the San Joaquin Valley should remain steady in volume with good/fair quality. Northern Baja is also staying steady in volume and quality with smaller fruit becoming more available.

Roma – Central Mexico / Northern Baja remain in moderate to light supplies and decent quality. San Joaquin Valley will remain in good supply and quality for the next couple weeks. Still expect to see a rise in the market with the East pressures on availability.

Cherry/Grape – With supplies in the East improving the West cherry toms should start to come down starting early next week. Quality is good and supplies are just meeting demand. Northern Baja / Central Mexico grape toms are seeing good quality and volume. San Joaquin Valley is in lighter supply with decent quality.



Commodities at a Glance



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

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

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

Avocado (Mexico)	Market	Quality
Michoacan, Mexico	Steady/Higher	Good

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

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

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

Berries (Blueberries)	Market	Quality
Salinas, CA	Steady	Good
Watsonville, CA	Steady	Good
Santa Maria, CA	Steady	Good
Sheridan, OR	Steady	Good
Oxnard, CA	Steady	Good
Hammonton, NJ	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

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
McAllen, TX	Steady	Good

Carrots	Market	Quality
Bakersfield/Santa Maria, CA	Steady	Excellent

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

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

Cherries	Market	Quality
Yakima, WA	Lower/Steady	Good

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

Citrus (Limes)	Market	Quality
Veracruz, Mexico	Steady	Excellent

Citrus (Oranges)	Market	Quality
Merced to Bakersfield, CA	Steady/Higher	Excellent
Riverside, CA	Steady/Higher	Excellent

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

Cucumber (Western)	Market	Quality
Southern Baja California Sur, Mexico	Lower/Steady	Good
Northern Baja California Norte, Mexico	Lower/Steady	Good



Commodities at a Glance



Eggplant (Eastern)	Market	Quality
Lee / Grady County, GA	Higher	Fair

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

Grapes (Green)		
Arvin, CA	Steady	Excellent

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	Steady	Fair
Salinas Valley, CA	Steady	Fair

Melon (Cantaloupe)		
Firebaugh, CA	Lower/Steady	Excellent

Melon (Honeydew)		
Firebaugh, CA	Steady	Excellent

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

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

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

Potatoes	Market	Quality
Quincy/Hermiston, WA	Steady	Good
Hamer/Rupert, ID	Steady	Good
Monte Vista, CO	Steady	Good
Plover/Bancroft, WI	Steady	Good

Potatoes (colored)		
Bakersfield, CA	Steady/Higher	Good
Stockton, CA	Steady	Good
Muleshoe, TX	Steady/Higher	Good
Ider, AL	Steady	Good
Elizabeth City/Camden, NC	Steady/Higher	Good
Hallwood/Horntown/Cape Charles, VA	Steady/Higher	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		
Madera south to Arvin, CA	Steady	Excellent

Tomatoes (Eastern)		
Cedarville/Hammonton, VA	Steady/Higher	Good
Charleston, SC	Steady/Higher	Good

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

