

Aug 3, 2015

the Source

Weather Update

An upper level low system approaching California will begin to push the strong high pressure ridge to the east mid-week. Coastal temperatures remain in the 70s, with 80s to low 90s in the interior valleys. A deepening marine layer will bring some drizzle to the coastal regions as overnight low temperatures remaining above normal through the week. Monsoonal moisture will bring a chance of showers and thunderstorms in the afternoon, especially over the higher terrain. Warm, humid temperatures will continue to push crops affecting yields, texture and shelf life moving forward.

Excessive heat continues in the Southwestern deserts stretching into Baja and Northern Mexico, with scattered showers possible each day. Slight cooling begins mid-week due to the low passing to the north.

In the Southeast region heavy rains, with possible flooding across Central Florida today as a lingering front slowly moves east. Areas to the north will continue with scattered showers and thunderstorms, heavy at times with temperatures in the mid 90s.

Severe storms with possible hail is forecast for the Ohio valley into the Northeast as weather patterns across the nation continue to impact crops from the numerous regions in production.



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.

Berries (Blueberries):

Volume continues to decrease sharply and looks to further decline into possible historic shortages by late August.

Berries (Strawberries):

Demand currently exceeds supply and quality issues are prevalent in all labels, industry wide.



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Truckin' Along

Supply is adequate in CA, WA, and ID. Rates are staying steady and fuel is dropping. This week's fuel is \$2.66 per gallon.

A Peek at Peak Seasons

Berries (Blackberries):

Peak season and volume are just around the corner and should hit by early-mid August.

Berries (Raspberries):

Projected peak season is early-mid August!

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

[full history](#)

	Change from				
	07/20/15	07/27/15	08/03/15	week ago	year ago
U.S.	2.782	2.723	2.668	⬇ -0.055	⬇ -1.185
East Coast (PADD1)	2.873	2.809	2.769	⬇ -0.040	⬇ -1.137
New England (PADD1A)	2.996	2.932	2.895	⬇ -0.037	⬇ -1.124
Central Atlantic (PADD1B)	2.985	2.918	2.885	⬇ -0.033	⬇ -1.104
Lower Atlantic (PADD1C)	2.762	2.701	2.654	⬇ -0.047	⬇ -1.163
Midwest (PADD2)	2.679	2.619	2.561	⬇ -0.058	⬇ -1.237
Gulf Coast (PADD3)	2.674	2.611	2.536	⬇ -0.075	⬇ -1.218
Rocky Mountain (PADD4)	2.770	2.735	2.685	⬇ -0.050	⬇ -1.192
West Coast (PADD5)	3.004	2.957	2.906	⬇ -0.051	⬇ -1.110
West Coast less California	2.873	2.814	2.761	⬇ -0.053	⬇ -1.169
California	3.111	3.072	3.024	⬇ -0.048	⬇ -1.063

Transitions & Temperatures

Potatoes:

Idaho, Washington, Colorado and Wisconsin transitioning from storage potatoes to New Crop.



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Commodity Updates



APPLES

California galas are peaking on 100/113s while 80s and are still high in color. The market is steady to slightly lower on most sizes but 80s and larger are still short.

Washington Red Delicious are steady to higher on all sizes and the market remains firm. Most shippers are peaking on 88s and larger in the premium and Washington extra #1 grades. Small red supplies are still limited. Golden Delicious are steady to slightly higher on all sizes due to stronger demand and lighter supplies. Gold 125/138s remain limited. The early golden varieties are available from some suppliers and the market is steady on all sizes. Granny-Smith are steady to higher and the market remains firm due to strong demand. The fruit is still peaking on 72s and larger while 100s and smaller remain short. Fujis and Galas are cleaning up quickly and supplies are extremely short. Many shippers are finished packing Galas and Fujis for the season and are selling from inventory. The markets for both varieties are active and will remain so until the CA fruit cleans up.

ASPARAGUS

The market on this commodity is steady, overall. Production out of Peru is moderate to light. Jumbo packs continue to be extremely tight in availability in all of the growing regions. Supplies are heavier on standard and large packs. Supplies out of Mexico have fallen off. This product can be loaded in Salinas or LA. Pricing could get stronger by the end of the week, especially on jumbo sizing. This market has a good chance at getting stronger by the end of the week.

AVOCADO (CALIFORNIA)

California harvest is declining and is expected to continue to decrease gently through August to season end. The Southern region is already wrapping up its harvest. Peak sizing is on 40s and 48s with very little smaller fruit. Very good demand is keeping supplies on all sizes tight. Quality and flavor are both excellent.



AVOCADO (MEXICAN)

Mexico's Flora Loca crop harvest is going well, with good volume coming in on 40s and 48s followed by 60s. Limited volume on #2 fruit as quality is very good. Expect Flora Loca to have less maturity than the old crop with lower oil, brighter green color and will be slower to break. Ripe fruit could still be green in color as the skin isn't mature enough for it to darken. Color is not an indication of ripeness, pressure is.



BELL PEPPERS (EASTERN)

With Michigan and Ohio now working pepper alongside the Carolinas, New Jersey and Tennessee, this market has dropped significantly. Demand is weak but should turn around and regain some strength over the next couple of weeks as school business comes back around.



BELL PEPPERS (WESTERN)

Green and colored bell peppers continue to be in a demand exceeds situation. Production has slowed and weather has been affecting yields. Green bells are still demand exceeds but market is softening slightly as some production is increasing. Green bells are slated to get short again next week as some fields are experiencing heat related harvesting issues. Red bell pepper demand is pressing markets slightly higher as supplies are leveling out.



BERRIES (BLACKBERRIES)

Availability has improved this week and we are seeing better volumes of fruit coming on. Some supply gaps are still affecting day to day availability as a few shippers are reporting being in between fields and subsequent harvests. Quality has been good overall. Peak season and volume are just around the corner and should hit by early-mid August.



Commodity Updates



BERRIES (BLUEBERRIES)

Overall volume has begun to decrease sharply. Big packs such as 18oz, pints and bulk packs are all becoming very scarce to non-existent. Shippers will continue to pack into smaller clamshells as the volume continues to decrease. Many of the regional areas are finishing or are packing storage fruit from their middle and late season varieties. Some reports of disease and insect pressure coming out of the Pacific Northwest regions. Labor has also been an issue as pickers try to beat the declining crop and move to regions with more work. Availability will become even more challenging as we move further into August. Demand is requiring both storage and fresh product to supply current orders. Some shippers are now reporting a major historic production gap to hit by mid-late August. They are expecting failure in service by late August. We will continue to monitor and update on this situation.



BERRIES (RASPBERRIES)

We have good availability and overall good quality in raspberries. This is an excellent time to promote fresh California raspberries as the current crop looks to peak by early-mid August!



BERRIES (STRAWBERRIES)

Demand exceeds supply. We have passed the peak of the spring/summer season and we're expecting the volume to now continually decrease in this area. Warm and humid weather continue in the Salinas/Watsonville strawberry growing regions and quality continues to suffer. Bruised, soft and full-red to overripe berries are prevalent in all labels, industry wide. Fruit is very small and more susceptible to bruising occurring as it is harvested and packed or while in transit. Bruising will lead to early decay. Mildew has also been reported with the ongoing high humidity. Mold may occur if the berries are exposed to warm temperatures, so it is of utmost importance to maintain the cold chain and keep the fruit between 32-34* at all times. Strawberry shippers are quoting quality issues at loading and are becoming more particular about where they will ship the fruit. Expectations must be adjusted to the current quality available as shippers are putting the best available fruit into the fresh packs. There are no other available loading locations or different growing regions to go to that will offer better quality at this time. Shelf life expectations must also be adjusted as fruit will not last as long as you are used to. Order for very quick turns.



BROCCOLI

This market is firm. Although the temperatures have been high in the growing regions, the quality is good, overall. Expect firm to stronger markets by the end of the week. The main production on this commodity continues to be out of the Salinas Valley. The Southern California region will have light production all week. Production out of Mexico is light to moderate. Texas is in production as well.



CARROTS

Bakersfield crop is in full summertime production. Jumbo size carrot production is good as is quality.



Commodity Updates



CAULIFLOWER

Cheaper offers continue to be available on large sizing, nine counts in particular. The quality overall is good with this commodity. Demand is a bit stronger compared to last week, but shippers are listening to offers. The Santa Maria region as well as Salinas have good production. Expect moderate to good supplies for the entire week.



CELERY

This market continues to gain strength on large pack sizes, twenty-four counts in particular. Santa Maria continues to have production, if needed in the Southern California region. The Salinas Valley has moderate to light production to begin the week. Michigan production is moderate at best. Expect good quality from all the regions. This market is likely to gain strength daily.



CITRUS (LEMONS)

Crop is peaking on 140s and smaller. Demand is exceeding supplies on 140s and larger and on all grades of fruit. Very good demand and drought conditions in growing areas means less production of fruit and no size growth. These are the major factors for the demand exceeds supply conditions on California Fruit. Chilean imports have arrived and are helping out supplies and easing the market prices.



CITRUS (LIMES)

The lime market has jumped up on all sizes. Growers are harvesting less than before and demand has passed the balance that had been going for several weeks. The old crop and new crop limes are going to be in light harvests through the month of August. The overall quality is good on the crop that is being harvested. Growers are getting into old crop limes and we may see thinner skin with lighter color in some lots.



CITRUS (ORANGES)

California Valencia oranges are going with good volume on 72s, 113s and 138s. Demand is improving on 88s/113s/138s and seeing prices firm up for some shippers as well as slowing the pace of packing fruit to begin stretching out this year's lighter volume crop. Quality on Valencias is very good.



CUCUMBERS (EASTERN)

The cucumber market has stabilized at the lower levels. Michigan and New Jersey are now fully ramped up. With schools back in, demand is a bit stronger than last week. Supplies are decent, so the market should remain somewhat steady.



CUCUMBERS (WESTERN)

Market is leveling out as new growers come online. Quality is generally good, but available lots do vary in quality and condition. Markets are lower. Promotable volumes on cucumbers are available.



EGGPLANT (EASTERN)

Eggplant in the east continues to be scarce. Michigan is now working eggplant but volume is still very light. That leaves the Carolinas and New Jersey, which are currently producing only limited volume. This market should stay at the higher levels for the remainder of the week.



EGGPLANT (WESTERN)

California is the main source of eggplant in the west. Current production is having trouble keeping up with demand. Because of recent weather and transitions, supplies have been lagging. Demand exceeds current supply and markets remain high.



Commodity Updates



GRAPES (GREEN)

The market on green seedless continues to weaken as supplies of the the Thompsons and Princess varieties increase. Demand is only fair at best. Quality is generally reported as good with a wide range of sizes now available.



GRAPES (RED)

The market on red seedless grapes continues to strengthen as we transition from Flames to Crimsons. Supplies are lighter with demand increasing in anticipation of the new school year. Quality is reported as excellent overall.



GREEN ONIONS

This market has remained unchanged with most suppliers. Demand is light. Good weather in the Mexico growing regions has allowed production to be plentiful. Good supplies are expected all week. Supplies will continue to exceed demand. All sizing is available, with the heavier availability coming in small and medium packs.



LETUCE ICEBERG

This market has remained unchanged. Quality issues include puffiness, insect damage and internal burn have been seen upon arrivals. The heat in all the growing regions have been strong. Nighttime temperatures continue to be in the mid to high 50s. The weights on palletized are averaging 42-47 pounds. Salinas and Santa Maria are the two main growing areas at this time. Production in Santa Maria is moderate. Markets are likely to be stronger by the end of the week.



LETTUCE LEAF

The romaine market is up and down among the different suppliers. High temperatures in the growing regions continue to exist and these high temperatures will continue for the entire week, at a minimum. Yields are being affected with all growers. Fringe burn, insects, dehydration and internal burn will be seen upon arrival. The weights on romaine cartons continue to average 31-36 pounds. Chopped romaine as well as romaine hearts continues to show pinking upon arrival. Fringe burn, mildew damage and insect pressure are defects associated with red and green leaf as well. With daytime temperatures in the 80s-90s all weekend expect all romaine and leaf items to have issues upon arrival.



MELON (CANTALOUPE)

The West Side is producing good volumes of lope 9's, 12's and 15's right now. The peak size is 9's and 12's. The size curve continues towards even larger sizes and further away from smaller sizes. The West Side has very good quality and acceptable sugar content. The current market is lower on 9's and 12's but steady on 15's and 18's. We are currently experiencing decent demand for cantaloupes.



MELON (HONEYDEW)

The peak size is currently 5s and is continuing to shift towards even larger sizes. Dew 8s are very scarce right now. The quality and sugar contents are really good for honeydews right now and this trend looks to continue. The market is heading upwards on dews. We are experiencing good demand on honeydews right now which is causing their price to climb upwards given the shorter supplies we have right now.



MELON (WATERMELON)

Most product coming in bins/cartons are packed upon request. Some light supplies are coming from Southern California, Southern Texas and Georgia. Market continues to be demand exceeds situation. We anticipate other districts to come online soon, possibly softening the market. This is contingent on good weather.



Commodity Updates



ONIONS

Onions supplies are good out of both New Mexico and California on all colors and sizes. Quality is good. Demand is good, which is keeping the market steady at higher levels. Yellow onions have started shipping out of both Washington and Idaho. Sizing is peaking on Jumbos and smaller. Red onions will start in about a week to 10 days. Quality is being reported as good.

PEARS

California Bartlett pears continue to peak on US #1 80-100s and the market is steady on all sizes but some have price flexibility. The demand is steady. Stark Crimson pears are peaking between 35-55 count half cartons and they are also steady. The quality for both colors has been good.

Washington is starting to pack Bartlett pears today. Washington D'anjou pears are peaking on US #1 80-100s and they are still available but the supplies are light. Most packers are limited on US #1 110s and smaller and are finished with the fancy grade. The D'anjou market is steady on all sizes and supplies are light.

Chilean pears are available in certain sizes but are cleaning up.

POTATOES

Idaho, Colorado and Wisconsin are in the middle of transitioning from storage crop to new crop Potatoes. New Crop is demanding a premium out of all areas. Idaho new crop is peaking on 70ct, with a good mix of larger and smaller cartons. Quality is being reported as good. Idaho storage Burbank potatoes will finish for the season at the end of next week. Quality is fair. Colorado, Wisconsin and Washington are all peaking on 80ct and smaller. The size will increase out of these areas, as they get into their next fields later this week or the front part of next week. Quality is being reported as good.



POTATOES (COLORED)

Bakersfield, California is still packing all colors but they will finish with reds and golds this Thursday. The markets are steady on all sizes and colors except gold As which are finished. The reds and whites are peaking on A-size. The quality has been good.

Stockton, California continues to pack reds, whites and golds. All three are peaking A-size and the markets are mostly steady. Premium and baker golds are limited along with #2 reds. The quality is good on all colors.

Parma, Idaho reds and golds are steady and both are peaking on A-size.

North Carolina still has a few cartons but is cleaning up.

Virginia is still packing all colors and all are heavy to A-size. The markets are steady and the quality has been good.

Wisconsin continues to pack reds and they have started with golds. The markets for both colors are steady but there is volume-flex on large Red A orders. The quality is good.

Minnesota reds are steady to lower and are also peaking on A-size. The quality has been good. They will also start packing golds sometime between the end of this week and early next.



SQUASH (EASTERN)

Demand is good and quality has been excellent. However, supplies on yellow squash remain a bit snug. This market should stay strong as we see the affects of recent high winds and wet weather in Michigan.



SQUASH (WESTERN)

Italian and yellow squash are steady/higher. Because of recent weather and transitions, some production has slowed down and demand has pressed markets up. Currently in a demand exceeds market. Quality varies throughout available lots. Better lots are moving at higher quotes.



Commodity Updates



STONE FRUIT

Small size peaches and nectarines are declining in availability. Sizing is running towards the larger sized fruit just as the school year begins. Demand overall is only fair except for the small volume fill packs. Quality is generally reported as good. The red and black plum market is about steady to lower as volume continues to be good. Most shippers are showing only average demand. Quality is reported as good.



TOMATOES (EASTERN)

Rounds - Volume continues to be on the rise. As the local programs ramp up we should see the beginning of a market downturn in price. Michigan product is available and Tennessee harvest still putting out large enough volume to take care of local buyers, less focus will be put on western shippers, calming the market even more. Quality is good.

Roma - Volume continues to increase. The demand in the east will soon meet supplies and we should see an ease in the market by next week. Quality is also good.

Cherry/Grape - Cherry market will remain tight throughout the summer. The east will rely heavily on the west for product. Grape market is steady with some availability. Volume should meet demand but product is also available in the west. Quality is good.



TOMATOES (WESTERN)

Rounds - Volume in California is falling short with high demand. High temperatures caused an early bloom and many shippers will have limited production scheduled for this week. The gap should only last until the end of this week. Quality is good. Again, a reminder that September and October will be challenging with light plantings and the weather issues keeping supplies very low.

Romas - Market continues to be steady. Baja's limited supplies are eased by the East Coast's increasing supplies. Quality in Baja is fair. Central California volume is light with some growers in either a gap or between harvests. Quality is good.

Cherry/Grapes - Cherry market continues to be strong. East coast will rely on the west through the summer. Pricing will continue to increase which should cause demand to fall. This should allow for availability for those who want to pay from them. Grape market continues to be steady with volume meeting demand. Quality is Fair/Good.



Commodities at a Glance



Commodity / Region	Market	Quality
Apples		
Wenatchee/Yakima, WA and Hood River, OR	Steady/Higher	Good
Stockton, CA	Lower/Steady	Good
Asparagus		
Coborca, Mexico	Steady	Good
Ica, Peru to Trujillo	Steady	Good
Salinas Valley, CA	Steady	Good
Avocado (California)		
Oxnard/Ventura, CA	Steady	Excellent
Avocado (Mexican)		
Michoacan, Mexico	Lower/Steady	Good
Bell Peppers (Eastern)		
Henderson / Buncomb County, NC	Lower	Good
Ottawa / Kent / Berrien County, MI	Lower	Good
Bell Peppers (Western)		
Oxnard, CA	Steady	Good
Salinas Valley, CA	Steady/Higher	Good
Berries (Blackberries)		
Salinas, CA	Steady	Good
Watsonville, CA	Steady	Good
Santa Maria, CA	Steady	Good
Oxnard, CA	Steady	Good
Berries (Blueberries)		
Grand Junction, MI	Higher	Good
Pitt Meadows, BC	Steady/Higher	Good
Salem, OR	Steady/Higher	Good
Mossyrock, WA	Steady/Higher	Good
Demotte, IN	Steady/Higher	Good
Berries (Raspberries)		
Salinas, CA	Lower/Steady	Good
Watsonville, CA	Lower/Steady	Good
Santa Maria, CA	Lower/Steady	Good
Oxnard, CA	Lower/Steady	Good
Berries (Strawberries)		
Salinas Valley, CA	Higher	Fair
Watsonville, CA	Higher	Fair

Commodity / Region	Market	Quality
Broccoli		
Celaya Guanjuato Mexico	Steady	Good
McAllen, TX	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good
Carrots		
Bakersfield/Santa Maria, CA	Steady	Excellent
Cauliflower		
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good
Celery		
Michigan	Higher	Good
Oxnard/Santa Maria, CA	Higher	Good
Salinas Valley, CA	Higher	Good
Citrus (Lemons)		
Oxnard/Ventura, CA	Lower/Steady	Good
Citrus (Limes)		
Veracruz, Mexico	Higher	Good
Citrus (Oranges)		
Merced to Bakersfield, CA	Steady/Higher	Excellent
Riverside, CA	Steady/Higher	Excellent
Cucumbers (Eastern)		
Henderson / Buncomb County, NC	Lower/Steady	Good
Seneca / Summit County, OH	Lower/Steady	Good
Ottawa / Kent / Berrien County, MI	Lower/Steady	Good
Cucumbers (Western)		
Southern Baja California Sur, Mexico	Steady	Good
Northern Baja California Norte, Mexico	Steady	Good
Eggplant (Eastern)		
Ottawa / Kent / Berrien County, MI	Steady	Fair
Eggplant (Western)		
Fresno, CA	Steady	Good
Southern CA	Steady	Good



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Commodities at a Glance



Commodity / Region	Market	Quality
Grapes (Green)		
Arvin, CA		
Lower/Steady	Good	
Delano, CA	Lower/Steady	Good
Fresno, CA	Lower/Steady	Good
Grapes (Red)		
Arvin, CA	Steady/Higher	Excellent
Delano, CA	Steady/Higher	Excellent
Fresno, CA	Steady/Higher	Excellent
Madera, CA	Steady/Higher	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/Higher	Fair
Salinas Valley, CA	Steady/Higher	Fair
Melon (Cantaloupe)		
Firebaugh, CA	Lower/Steady	Excellent
Mendota, CA	Lower/Steady	Excellent
Melon (Honeydew)		
Firebaugh, CA	Steady/Higher	Excellent
Mendota, CA	Steady/Higher	Excellent
Melon (Watermelon)		
Coachella Valley	Steady/Higher	Good
McAllen, TX	Steady/Higher	Good
Onions		
Huron/Metler, CA	Steady	Good
Las Cruces, NM	Steady	Good
Ontario, OR to Nampa, ID	Steady	Good
Quincy/Hermiston, WA	Steady	Good

Commodity / Region	Market	Quality
Pears		
Wenatchee/Yakima, WA and Hood River, OR		
Steady	Good	
Stockton, CA	Steady	Good
Chile	Lower/Steady	Good
Potatoes		
Hamer/Rupert, ID	Steady/Higher	Good
Quincy/Hermiston, WA	Steady/Higher	Good
Eastern Colorado	Steady/Higher	Good
Plover/Bancroft, WI	Steady/Higher	Good
Potatoes (colored)		
Bakersfield, CA	Steady	Good
Stockton, CA	Steady	Good
Rupert to Rexburg, ID	Steady	Good
Plover, WI	Steady	Good
Big Lake Minnesota	Lower/Steady	Good
Hallwood/Horntown/Cape Charles, VA	Steady	Good
Squash (Eastern)		
Seneca / Summit County, OH	Steady	Fair
Ottawa / Kent / Berrien County, MI	Steady	Fair
Henderson / Bucombe County, NC	Steady	Good
Squash (Western)		
Santa Maria, CA	Steady/Higher	Good
Southern Coast CA	Steady/Higher	Good
Stone Fruit		
Madera south to Arvin, CA	Lower/Steady	Good
Tomatoes (Eastern)		
Exmore, VA	Steady	Good
Charleston, SC	Steady	Good
Tomatoes (Western)		
Northern Baja California Norte, Mexico	Steady	Good
Coachella Valley, CA	Steady	Good
Southern San Joaquin Valley, CA	Steady	Good

