

Feb 15, 2016

# the source

## Weather Update

High temperatures for the start of this week in Northern and Southern California with temperatures in the 80's. But that will be short lived as much cooler temperatures will begin Wednesday. Scattered showers in parts of Florida today with thunderstorms for tomorrows forecast. Temperatures in the low 70's to low 80's. Mexico is showing very hot temperatures in the 80's to 90's in most growing regions.



## Market Alerts

**Bell Peppers (Eastern):** Light Supplies. Market higher.

**Bell Peppers (Western):** Market Much Higher on all Bells.

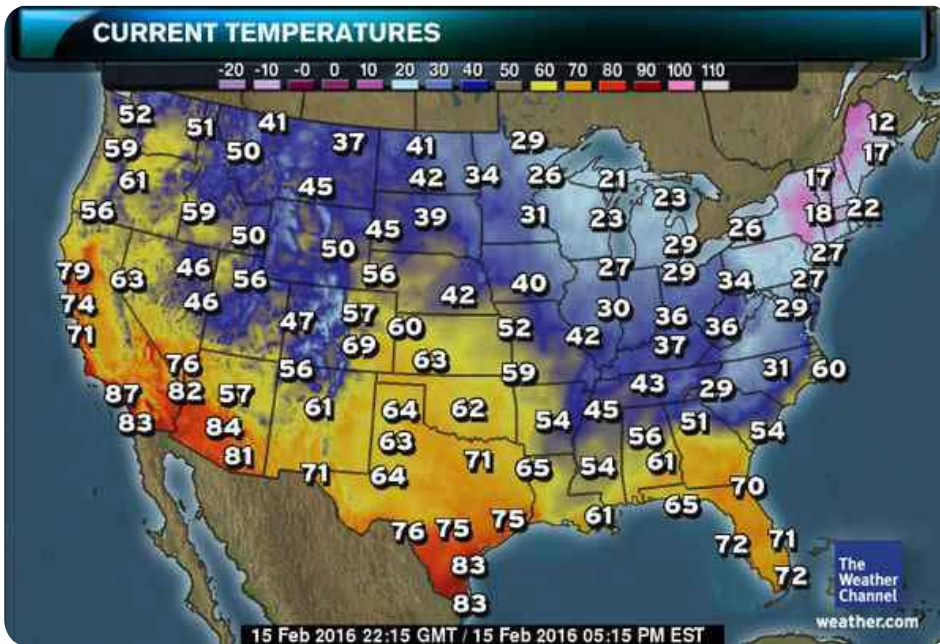
**Berries (Raspberries):** Limited supplies are expected for the next 2-3 weeks.

**Grapes (Red):** Last month's rains and current high humidity affecting quality and market.

**Melon (Watermelon):** Seedless watermelon supplies continue to be very short with higher pricing and demand exceed supply.

**Squash (Eastern):** Squash will remain extremely limited with much higher prices. Bad weather will have an impact on quality in the weeks to follow.

**Stone Fruit:** Availability of stone fruit improving.





## A Peek at Peak Seasons

**Berries (Blueberries):** Chile is in peak production!

## Truckin' Along

California and Arizona trucks look to be steady again this week. Washington and Idaho potato trucks are steady as well. Idaho onion trucks remain a little tighter than normal. The National Average dropped last week to 2.008 per gallon and will update again tomorrow due the Presidents day holiday. A difference of \$0.827 from this time last year. California prices dropped slightly as well to 2.369 per gallon. Crude oil remained steady and is now at \$29.76 per barrel.

	05/25/15	06/01/15	06/08/15	week ago	year ago
U.S.	2.914	2.909	2.884	↓ -0.025	↓ -1.008
East Coast (PADD1)	3.014	3.001	2.980	↓ -0.021	↓ -1.003
New England (PADD1A)	3.101	3.092	3.076	↓ -0.016	↓ -1.016
Central Atlantic (PADD1B)	3.162	3.143	3.122	↓ -0.021	↓ -0.957
Lower Atlantic (PADD1C)	2.884	2.874	2.853	↓ -0.021	↓ -1.033
Midwest (PADD2)	2.800	2.804	2.774	↓ -0.030	↓ -1.071
Gulf Coast (PADD3)	2.803	2.799	2.783	↓ -0.016	↓ -0.986
Rocky Mountain (PADD4)	2.830	2.835	2.825	↓ -0.010	↓ -1.084
West Coast (PADD5)	3.174	3.163	3.121	↓ -0.042	↓ -0.874
West Coast less California	3.057	3.055	3.001	↓ -0.054	↓ -0.898
California	3.269	3.249	3.217	↓ -0.032	↓ -0.857

# Commodity Updates



## APPLES

**Washington** - Red delicious are steady on all sizes but 88s and smaller remain firm. All sizes of the lower grade reds remain short and most shippers are subbing up in the upper grades to cover. Most suppliers continue to peak on 72-88s. Golden delicious are steady on all sizes and grades but the lower grade fruit remains firm. Golden delicious are still peaking on Wash-Extra 100/113s and most shippers don't have much larger than an 88-size. Granny-smith are steady on all sizes and are still peaking on 88-113s. Most Granny shippers still don't have much larger than an 88 or smaller than a 125. Galas are steady on all sizes and grades but the market is strong due to increased demand from the east coast. Most Gala shippers don't have much fruit larger than an 88. Fujis are also steady but strong on all sizes. Washington Fujis continue to peak on extra-fancy 80-100's. Honeycrisp are mostly steady and the market remains high and strong due to light supplies. Jonagolds and Braeburns are still available but supplies are limited. The quality for all varieties has been good.

**Michigan** - Red delicious are steady on all sizes and continue to peak on 80/88s. Most Michigan shippers have less small fruit than large. McIntosh are steady and are still heavier to 125/138s but supplies are light. Galas are steady on all sizes but supplies are light. Golden delicious are steady but strong due to light supplies and they continue to peak on 125/138s. Jonathans are steady on all sizes and they are still peaking on 150/138/125s. Jonathans are still the low-price leader for small fruit in Michigan. Fujis are steady and they are peaking on 125/138s. Red Romes are steady but most shippers will deal on volume orders. Braeburn supplies are getting light.

**New York** - Red delicious, Macs, Cameos, Romes, Crispins, and Empires are all steady. Gala and Golden delicious supplies are light and both markets are steady but firm. Red Rome volume is good and some shippers will flex for volume on the smaller sizes. Empire volume is hit and miss but there are deals when they are available. The quality has been good on all varieties.



## ASPARAGUS

The asparagus market continues to be steady with aggressive pricing. All shippers are packing both 11/1# and 28/1# asparagus. Quality is excellent with little to no spreading of the tips and excellent green color. Limited supplies on Extra Large and Jumbo.



## AVOCADO (MEXICAN)

Good supplies are crossing into the US even with the cut back most shippers have done for the post Super Bowl demand. The size curve continues to be a real mismatch for the demand and has shippers upside down. The size curve which is running heavy to the 32s/36s/40s is still causing supplies issues on 48s/60s/70s, but there are signs of some normality returning.



## BELL PEPPERS (EASTERN)

Bell Pepper supply is very tight. Fields have been damaged and yields have been greatly reduced.



## BELL PEPPERS (WESTERN)

**Green Bells** - Supply have increased with quality improving. market is still strong.

**Red Bells** - Lighter supply this week with higher market.

**Gold Bells** - Improved supply with better quality and pricing.

**Orange Bells** - Limited Supply with higher Pricing.



## BERRIES (BLACKBERRIES)

Increased availability this week with more shipments arriving from Central Mexico. Demand is moderate and quality has been good overall. Minor reports of red cell and juicing in some of the older lots of berries.



# Commodity Updates



## BERRIES (BLUEBERRIES)

As production in Chile and Mexico increase and more shipments are arriving into the US, adequate supplies have been available and should continue through the coming weeks. Quality has improved with the new shipments and is good overall. Demand has been moderate but is increasing for higher quality fruit. Some split pricing as blueberries via air shipments are arriving on the west coast from Chile. These are being sold at a premium price. Chile is in peak production!



## BERRIES (RASPBERRIES)

Demand is good and supply is very limited due to disrupted production and delays with transfers coming from Mexico. Overall, quality has improved over recent weeks.



## BERRIES (STRAWBERRIES)

Now that we have passed Valentine's Day, demand has backed off some and availability has increased. More favorable weather in CA and FL have helped to bring on more fruit and this is helping to supply the gaps we have recently experienced. MX is seeing some very warm days and nights which is likely to begin affecting quality of fruit from this region. It may also limit the amount of fruit being sent to the US if quality issues become a major factor.



## BROCCOLI

Steady supplies for the front side of the week have continued to keep this market at reasonable levels. Many different growing regions are currently harvesting broccoli. Thus keeping the market flat. Quality is good from all growing regions with nice crown size to dark green color.



## BRUSSELS SPROUTS

Supplies from Mexico are much better and the market is declining to reasonable levels. Also Jumbo sized Brussel Sprouts are becoming more available as well. Quality has improved as well. Look for this market to continue to decline as the week progresses.



## CARROTS

Cooler weather in growing area has really slowed growth on the new crop coming out of the Coachella and Imperial Valleys of California. Carrots are very small and yields are extremely light on Jumbo size carrots. Weather is warming, but it will take 3 to 4 week for size to come. Supplies of medium size and baby peeled carrots are is good.



## CAULIFLOWER

Cauliflower supplies remain limited as we continue this week with a supply gap in acreage. The market is active with shippers dictating costs. Sizing has trended towards 16 count. Overall quality is still good in both growing regions with nice white color.



## CELERY

The celery remains steady in Florida. The quality continues to be good. Production in Oxnard and Yuma the region is much better. The only issues have been weights. Reports indicate the cases have been in the mid to high 40# range. The product is clean however in all the growing regions. Large sizing has tightened up in availability. Warm temps in all the growing are expected throughout the week.



## CHILI PEPPERS

**Jalapenos** - Improved supplies of good quality with good size and stronger pricing.

**Anaheim** - Overall quality is very good with very good sizing. Better sizing and production. Market is stronger

**Poblano** - Quality is generally good, sizing in the medium, large range. Supplies are good.

**Tomatillo** - Has increased in supply. Quality is good, and are sizing medium and large.



# Commodity Updates



## CILANTRO

Good supplies of cilantro from all growing regions. The market remains aggressive at promotable prices. Quality is also good with occasional yellowing and black leaves.



## CITRUS (LEMONS)

The desert crop is done for their season. The central valley crop is 42% harvested and the Ventura crop has just begun. With the desert done, this will create greater demand on these other 2 areas. Demand remains very strong.



## CITRUS (LIMES)

The lime market is much higher right now on all sizes. Demand is good on all sizes across the board. The peak sizes are 110's and 150's currently with fewer small sized limes being harvested. This is the time of year where supplies are low and will remain at lower levels until the first or second week of May. The upward market trend will likely continue with the lower supplies through to first part of May. Quality is excellent overall.



## CITRUS (ORANGES)

Clear and warm weather last week has all house packing. Eating excellent and look beautiful, with peak sizing on 72s/56s/88s. We are seeing fruit size up, and a dropping in percentage of small size fruit 113s/138s. Demand is stronger on the 113s/138s and markets are firming and beginning to be very active on these sizes.



## CUCUMBERS (EASTERN)

Cucumber Market is steady at very reasonable pricing continues. Quality remains good on Honduran imports.



## CUCUMBERS (WESTERN)

Production is improving on all cucumbers. good supply on all sizes.



## EGGPLANT (EASTERN)

Florida eggplant supply has decreased, Market is steady with a stronger undertone. Quality is fair



## EGGPLANT (WESTERN)

Market stays strong due to light supply, many number two product being offered.



## GRAPES (GREEN)

The seedless green grape market is steady with light supplies and adequate demand. Quality has been generally good with only an occasional complaint on color or wet berries. This market appears poised to maintain through the end of the month with little disruption of supply forecast.



## GRAPES (RED)

The red seedless grape market is steady to higher. We are currently feeling the pressure of last months rains and historically high humidity in Chile. The quality of the fruit is beginning to show the effects in quality as wet berries and splits are becoming more prevalent. Add to this the gradual move to new crop Crimsons from the current flames and we project lighter supplies for the next two to three weeks.



## GREEN ONIONS

There is a two tiered supply situation here. Iced green onions are more readily available and iceless green onions supplies have remained difficult as a result of limited crossing from Mexico. The market has remained at steady levels but supplies will still be erratic for the rest of the week. Quality is hit and miss with some arrivals showing browning of the tops.



# Commodity Updates



## KALE

Kale supplies remain steady in all growing regions. The market on the other hand varies from shipper to shipper. Quality is excellent with nice dark green color.



## LETTUCE ICEBERG

The market is active. Many suppliers started the week sold out. Supplies are not expected to be better until near the end of the week. The desert region will have high temperatures with no rain in the forecast for the entire week. Defects on lettuce continue. These defects include light color, misshapen and ribby heads, peeling epidermis, blister and growth crack. The weights are averaging 39-43 pounds. Expect pricing to get stronger throughout the week, with supplies being limited. there will be some gaps in pricing.



## LETTUCE LEAF

This market is steady, overall. Supplies look to be plentiful throughout the week. Warm temperatures in the growing regions will likely turn this market around next week. For now, suppliers are looking to keep inventories clean. Pricing is competitive. Blister and peel will continue on romaine. These defects will continue through February. The quality issues continue on all other leafy green items, like romaine. Blister and peel for example are seen on green and red leaf. The weights on romaine have been averaging 26-32 pounds, while green leaf has been approximately 20-23 pounds.



## MELON (CANTALOUPE)

Overall cantaloupe supplies are lightening up and look to do so for the next two weeks due to the transitioning of growing regions. The quality is good overall with some lots being exceptionally nice. The peak size is currently 9ct with 6ct sized lopes being packed. We are experiencing okay demand on the cantaloupes. The current market is higher on 9ct and higher on what is available on 12ct and 15ct. There are very few 15ct lopes being packed and zero 18ct being packed.



## MELON (HONEYDEW)

Demand is good on all sizes and supplies are good also. The peak size for the offshore is 5ct and the small amount of Mexican dewes are peaking on 6ct. The small sizes aren't as available as the larger ones. Honduran grown honeydews have been arriving for several weeks in Florida and the west coast and their quality is really good. Mexican dewes continue to ship out of Nogales AZ and the volume is light. The Mexican dewes are very nice also. The market is slightly lower across the board.



## MELON (WATERMELON)

The forecast has changed with some product now available. Quality is fair Continued high pricing with better supply.



## ONIONS

Onion market is steady out of all areas ( Idaho, Washington, Colorado) the start of this week. Demand is light. Quality out of the Northwest storage onions are fair to good depending on which storage they are coming out of. The main issue showing up is light transparency in the outer layers of the Yellow onions and decay and light mold in the Reds. Mexico onion supplies crossing into the U.S. will pick up this week with all colors including red onions. Quality is being reported as good.



# Commodity Updates



## PEARS

**Washington** - D'anjous pears are still peaking on US#1 70/80s. Limited pack-time plus larger fruit isn't helping satisfy the strong demand for 110s and smaller. Bosc pears are steady and continue to peak on US#1 90/100/110s but they have better availability on small fruit. Fancy grade bosc are also short. Bartletts are steady on all sizes but the market remains high and strong due to light supplies. Bartletts are still available but supplies are light, most shippers will finish them this week or next. Red pears are steady on all sizes and are still producing mostly half carton 45/50s and full carton 90/100s, but supplies are lighter. The quality on D'anjous, Bosc, and red pears has been good.

**Chile** - Bartlett pears are available on both coasts now and they are peaking on 100/110s. The market is steady to higher and the demand is strong.



## PINEAPPLES

Pineapple supplies are in a light, but steady supply period that is expected to go through Easter.



## POTATOES

**Idaho**- Demand is light to moderate with a steady market on all sizes and packs. Quality good with an occasional lot showing light peepers. Look for the markets to be steady through the balance of this month.

**Washington, Colorado and Wisconsin** - Demand is moderate on cartons with very light demand on Non-A. This is keeping most sheds only running part days. Quality is good.



## POTATOES (COLORED)

**Bakersfield, California** - Reds and golds are steady and continue to peak on A-size. White potatoes are higher due to strong demand and light supplies. The quality has been good.

**Western Washington** - Reds and golds are steady and both continue to peak on A size. The quality has been good on all sizes and both colors.

**Idaho** - Reds and golds are steady but supplies are lighter and some suppliers have holes in their manifest. Both colors are speaking on A-size and the quality has been good.

**Wisconsin** - Reds and golds are both steady but the market is firm as the shippers battle storage quality. Reds and golds are peaking on A-size. Premium and baker reds, premium and baker golds, and gold Cs still are not available. The quality has been good.

**North Dakota** - Reds and golds are steady on all sizes but the volume red volume deals are still available. Both colors are peaking on size A and have only limited availability in the premiums and bakers. The quality has been good.

**S. Florida** - All colors are steady but remain relatively high due to generally light supplies. The reds and golds are peaking on A-size while the whites are heavier to B's. Many suppliers are sold-out of White As this week.



## SQUASH (EASTERN)

Squash supply is better, green supply is very good, market is lower. Shippers are starting to cover orders on yellow squash, prices are lower but still not cheap by anyone's standard. Quality is fair but starting to get better.



## SQUASH (WESTERN)

Good availability in hard squash. Spaghetti, Butternut, Acorn, Kabocha Market is steady. Supply continues to be very short on yellow squash. Italian squash has better supply.



# Commodity Updates



## STONE FRUIT

The market on peaches, plums and nectarines is easing off as supplies continue to improve out of Chile. Sizing is running from a 40 count tray pack up to a 60 volume fill on peaches and nectarines. Plums are running from 40 tray packs to as small as a 70 volume fill in both red and black's. Quality is generally good on all.



## TOMATOES (EASTERN)

**Rounds** - The market is steady. East continue to struggle due to weather conditions, with production and yields. Out west, supplies continue to get better with Mexico crossings, however, sizing still a bit of an issue. Look for Florida to continue to be lighter through the winter. Demand consistent in all areas. Quality is Good.

**Roma** - The market is steady. Weather continues to effect yields in Florida. Look for Florida to continue with lower supplies. Similar to rounds, roma supplies looking better out west. Quality is Good.

**Cherry** - The market is higher. Supplies continue to tighten up on the cherry's. Production and yields continue to be effected by weather. Look for supplies to continue to be a struggle in all areas. Quality is Good / Fair.

**Grape** - The market is higher. Supplies also continue to be tight on the grapes. Demand on the grapes continue to be strong. With Mexico continuing to struggle with supplies, look for the market to be strong. Quality is Good / Fair.



## TOMATOES (WESTERN)

**Rounds** - The market is steady. Supplies out of Mexico continues to be a little better. Sizing continues to be a bit of a struggle. Florida supplies continue to be lighter, and should continue to be lighter moving forward. Quality is Good.

**Roma** - The market is steady. Supplies also looking better out of Mexico, similar to the rounds. Florida continues to struggle with production and yields. Demand continues to be consistent in all areas. Quality is Good / Fair.

**Cherry** - The market is higher. Supplies continue to be extremely short in all areas. Weather conditions back east continue to effect supplies. Look for demand to continue to be stronger, due to the lack of product. Quality is Good / Fair.

**Grape** - The market is higher. Supplies continue to be tight in the west and east. Much like the cherry's, supplies looking to be tighter in all areas. Expect the market to continue to be stronger in all areas. Quality is Good / Fair.





# Commodities at a Glance



Commodity / Region	Market	Quality
<b>Apples</b>		
Coopersville/Belding/Sparta, MI	Steady	Good
Hudson/Pleasant Valley/Red Hook, NY	Steady	Good
Wenatchee/Yakima, WA and Hood River, OR	Steady	Good
<b>Asparagus</b>		
Coborca, Mexico	Steady	Excellent
<b>Avocado (Mexican)</b>		
Michoacan, Mexico	Steady/Higher	Excellent
<b>Bell Peppers (Eastern)</b>		
Indian River / Dade County, FL	Higher	Fair
<b>Bell Peppers (Western)</b>		
Southern Sinaloa/Nayarit, Mexico	Steady/Higher	Fair
<b>Berries (Blackberries)</b>		
Central Mexico	Steady	Good
<b>Berries (Blueberries)</b>		
Central Mexico	Steady	Good
Baja California, Mexico	Steady	Good
Southern Chile	Steady	Good
<b>Berries (Raspberries)</b>		
Central Mexico	Higher	Good
Oxnard, CA	Higher	Good
<b>Berries (Strawberries)</b>		
Oxnard, CA	Lower/Steady	Good
Central Mexico	Lower/Steady	Good
Central Florida	Lower/Steady	Good
<b>Broccoli</b>		
Celaya Guanajuato Mexico	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Phoenix, AZ	Steady	Good
Yuma, AZ	Steady	Good
<b>Brussels Sprouts</b>		
Northern Baja California Norte, Mexico	Lower	Good

Commodity / Region	Market	Quality
<b>Carrots</b>		
Coachella Valley, CA	Steady	Excellent
<b>Cauliflower</b>		
Oxnard/Santa Maria, CA	Steady/Higher	Good
Yuma, AZ	Steady/Higher	Good
<b>Celery</b>		
Belle Glade, FL	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Yuma, AZ	Steady	Good
<b>Chili Peppers</b>		
Northern Sonora, Mexico	Higher	Good
<b>Cilantro</b>		
Baja, MX	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
<b>Citrus (Lemons)</b>		
Merced/Bakersfield, CA	Steady/Higher	Good
Oxnard/Ventura, CA	Steady/Higher	Good
<b>Citrus (Limes)</b>		
Veracruz, Mexico	Higher	Excellent
<b>Citrus (Oranges)</b>		
Merced to Bakersfield, CA	Steady	Excellent
Riverside, CA	Steady	Excellent
<b>Cucumbers (Eastern)</b>		
Indian River / Dade County, FL	Steady	Good
Olancho, Honduras	Steady	Good
<b>Cucumbers (Western)</b>		
Northern Sonora, Mexico	Steady/Higher	Fair
<b>Eggplant (Eastern)</b>		
Hillsborough / Western Collier County, FL	Steady/Higher	Fair
<b>Eggplant (Western)</b>		
Northern Sonora, Mexico	Higher	Fair



# Commodities at a Glance



Commodity / Region	Market	Quality
<b>Grapes (Green)</b>		
Coquimbo/Valaparaíso/Santiago/Rancagua, Chile	Steady	Good
<b>Grapes (Red)</b>		
Coquimbo/Valaparaíso/Santiago/Rancagua, Chile	Steady/Higher	Good
<b>Green Onions</b>		
Mexicali, Baja	Steady	Good
<b>Kale</b>		
Baja, MX	Steady	Excellent
Oxnard/Santa Maria, CA	Steady	Excellent
<b>Lettuce Iceberg</b>		
Yuma, AZ	Higher	Fair
<b>Lettuce Leaf</b>		
Oxnard/Santa Maria, CA	Steady	Fair
Yuma, AZ	Steady	Fair
<b>Melon (Cantaloupe)</b>		
Choluteca, Honduras	Higher	Excellent
Mita, Guatemala	Higher	Good
<b>Melon (Honeydew)</b>		
Choluteca, Honduras	Lower	Excellent
Mita, Guatemala	Lower	Excellent
Caborca, Mexico	Lower	Excellent
<b>Melon (Watermelon)</b>		
Jalisco, Mexico	Higher	Fair
<b>Onions</b>		
Ontario, OR to Nampa, ID	Steady	Fair
Quincy/Hermiston, WA	Steady	Fair
Tampico/Sonora, Mexico	Steady	Good
<b>Pears</b>		
Wenatchee/Yakima, WA and Hood River, OR	Steady	Good
Chile	Steady/Higher	Good

Commodity / Region	Market	Quality
<b>Pineapples</b>		
Alajuela, Costa Rica	Higher	Good
Heredia, Costa Rica	Higher	Good
Limon, Costa Rica	Higher	Good
La Ceiba, Honduras	Higher	Good
Retalhuleu, Guatemala	Higher	Good
Peten, Guatemala	Higher	Good
<b>Potatoes</b>		
Hamer/Rupert, ID	Steady	Good
Quincy/Hermiston, WA	Steady	Good
Eastern Colorado	Steady	Good
Plover/Bancroft, WI	Steady	Good
<b>Potatoes (colored)</b>		
Bakersfield, CA	Steady	Good
Mount Vernon, WA	Steady	Good
Rupert to Rexburg, ID	Steady	Good
Plover, WI	Steady	Fair
Red River Valley, ND	Steady	Good
Imokollee/Palm City/Punta Gorda, FL	Steady	Good
<b>Squash (Eastern)</b>		
Dade / Eastern Collier County, FL	Lower/Steady	Fair
<b>Squash (Western)</b>		
Northern Sonora, Mexico	Steady	Good
<b>Stone Fruit</b>		
Coquimbo, Valaparaíso, Santiago and Rancagua, Chile	Lower/Steady	Good
<b>Tomatoes (Eastern)</b>		
Southern Florida	Steady/Higher	Good
Northern Florida	Steady/Higher	Good
<b>Tomatoes (Western)</b>		
Northern Baja California Norte, Mexico	Steady/Higher	Good
Northern Sonora, Mexico	Steady/Higher	Good
Central Sonora, Mexico	Steady/Higher	Good

