

Jul 25, 2016

the source

Weather Update

High pressure out west gradually builds this week as the heavy marine layer conditions continue in the coastal locations. Inland regions will see steady warming through the week with the low clouds and fog keeping overnight temperatures on the warm side along the coast. Monsoonal moisture will continue in the southwestern deserts, Baja and Northern Mexico along with above average temperatures and strong winds into mid-week. Central Mexico will see seasonal temperatures and scattered afternoon showers through the week. High pressure in the Southeast will bring a gradual warming trend and scattered showers to the region through the week.



Market Alerts

Cherries: The Northwest cherry season has come to an end. Shippers have limited availability of previously harvested inventory and are expecting to be done by the middle of the week.

Cilantro: The cilantro market is active due to supplies being limited from Mexico and poor quality.

Lettuce Iceberg: Iceberg lettuce supplies tightening up.

Onions: High Temperatures in California continue





Truckin' Along

California trucks remain steady and looks to remain that way for the week. Washington and Idaho potato trucks remain steady as well. The National Average for diesel dropped slightly and is currently at 2.379 per gallon. A difference of .344 from this time last year. California prices dropped slightly as well and are currently at 2.764 per gallon. Crude oil is also steady and is now at 43.08 per barrel.

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

[full history](#)

	07/11/16	07/18/16	07/25/16	Change from	
				week ago	year ago
U.S.	2.414	2.402	2.379	↓ -0.023	↓ -0.344
East Coast (PADD1)	2.424	2.411	2.387	↓ -0.024	↓ -0.422
New England (PADD1A)	2.469	2.446	2.434	↓ -0.012	↓ -0.498
Central Atlantic (PADD1B)	2.521	2.503	2.481	↓ -0.022	↓ -0.437
Lower Atlantic (PADD1C)	2.341	2.332	2.306	↓ -0.026	↓ -0.395
Midwest (PADD2)	2.385	2.369	2.341	↓ -0.028	↓ -0.278
Gulf Coast (PADD3)	2.261	2.262	2.242	↓ -0.020	↓ -0.369
Rocky Mountain (PADD4)	2.445	2.435	2.434	↓ -0.001	↓ -0.301
West Coast (PADD5)	2.708	2.686	2.663	↓ -0.023	↓ -0.294
West Coast less California	2.596	2.569	2.536	↓ -0.033	↓ -0.278
California	2.798	2.780	2.764	↓ -0.016	↓ -0.308

Transitions & Temperatures

Apples: Washington will start packing a few Ginger Gold apples tomorrow but they have to cure the bruises out for a week or so, so they won't be able to ship right away. Washington will pack a few Galas on Saturday.

Berries (Blueberries): Peruvian blues should begin to hit the US around the first of September.

Berries (Strawberries): Santa Maria new Fall crop (Summer-planted) strawberries are expected to begin harvests the first couple weeks of August.

Pears: Washington will start to pack Bartlett pears tomorrow.

Commodity Updates



APPLES

Washington - Red delicious are steady on all sizes. Most shippers continue to peak on extra-fancy 72-88s. Golden's are still peaking on Wash-Extra 100/113s and are steady but firm due to light supplies. Some suppliers are gapping between C.A. and the new-crop earli/gingergolds. Most suppliers still don't have much larger than an 88-size. Granny Smith are steady on all sizes and continue to peak on 88-113s. Most shippers still don't have much larger than an 88. Gala and Fuji supplies are extremely short as most shippers are done and the others are shipping from inventory. Pink Lady's are steady but the market is steady to higher due to very strong demand and light supplies. Many shippers are also finished with Pinks. The quality for all varieties has been good.

California - Galas are steady to slightly lower and they are still peaking on smaller fruit. The quality is good.

Chile - Chilean Braeburns are peaking on 70-90s and they are steady on all sizes. Chilean Pinks Ladys are steady and peaking on 70/80s. Chilean Fujis are also steady and peaking on 80-size. The Chilean fruit availability is better on the east coast than the west. The import quality has been good.

ASPARAGUS

Asparagus supplies are still steady from Mexico, but lower from Peru. Quality is good from both regions.

AVOCADO (CALIFORNIA)

California has peaked on their harvest and is on a slow decline to mid August, when the next big drop looks to happen as its season begins its final seasonal harvest.

AVOCADO (MEXICAN)

Mexico has been harvesting for two weeks now and fruit is now working its way through the supply chain. Inventories are showing good on 60s and 70s, but on 48s, still limited and they look to stay this way possibly through September. We will be in this Summer Crop (Flora Loca crop) of Mexico's

for the next 6 to 10 weeks and should have decent supplies going forward, unfortunately about 80% of this crop will be 60s/70s/84s. Not many 40s/48s and we don't see this size curve changing much, maybe 25% 48s and larger by September. We will also see very limit supplies on #2 volume, being it's early in the season, and fruit is very clean.

BELL PEPPERS (EASTERN)

The Bell Pepper market remains steady with a weaker undertone. North Carolina has had most of the supply and it is concentrated in very few hands. New Jersey has started and their supply is picking up. Michigan started last week in light volume and should pick up this week. A few storms slowed harvest over the weekend. Canada will start the first of August.

BELL PEPPERS (WESTERN)

Bell pepper has moved up to the Central and Southern San Joaquin Valley. Better supply and size on both Green and Red Varieties, Sizing is good on Both colors. Reds are still showing the effects of the heat with some condition defects, quality is expected to improve as we move forward.

BERRIES (BLACKBERRIES)

Supply is steady with production out of CA, OH, IN, WA and OR. Some growers are gapping in between varieties out of Oregon. Georgia and North Carolina season has pretty well wrapped up production, much smaller volumes. Demand has increased slightly out west due to GA and NC production coming off. Quality is good out of all areas. There have been some isolated instances of wet and leaky berries.



Commodity Updates



BERRIES (BLUEBERRIES)

Supply is lighter than recent weeks and markets have strengthened from all growing regions. The Pacific Northwest production in Oregon, British Columbia and Washington has backed off some due to recent rainy weather. We do not expect this seasonal crop to ramp back up. Michigan was slow to start this week due to rain and Indiana is producing blueberries steadily. New Jersey, Georgia and North Carolina have wrapped up major production although you may still find some blues in circulation from these growing regions.

BERRIES (RASPBERRIES)

Supplies are still limited but we are seeing minimal increases and better availability than the previous weeks. We believe the low-point for summer production was mid-July and that production from CA and Baja, MX will now begin to stair-step back up until mid-August. Quality has remained good out of all regions, some isolated instances of wet, leaky or off-color berries.

BERRIES (STRAWBERRIES)

Supply is steady with very good demand. Quality is good with pickers paying extra attention to pack quality and avoid bruised and overripe fruit. There have been a few reports of white shoulders and green tips still showing up in the packs. Sizing is even smaller than the last few weeks with berries running 18-26 per 1 pound clamshell. Weather has been cool leading to a reduction in harvest estimates. Labor is becoming more of an issue with all growers.

BROCCOLI

Broccoli supplies are plentiful for the start of this week. Markets are aggressive out of all growing regions. Quality is really nice with good crown size and minimal yellowing.

BRUSSELS SPROUTS

As Mexico finishes up over the next couple of weeks, this will put pressure on supplies out of California. The market has an upward trend but supplies remain abundant. Quality is excellent out of California but product from Mexico is having arrival issues with black leaves.

CARROTS

The Bakersfield crop is in full production. Growth is good and producing good percentage of Jumbo size and supplies are getting much better. Supply of baby peeled carrots are good.

CAULIFLOWER

The cauliflower market is steady with good supplies from both Salinas and Santa Maria growing regions. Quality has been good with minimal arrival issues. Some of the quality issues being reported on arrival have been black to brown bruising of the cauliflower.

CELERY

The celery market is steady with supplies running heavily to the larger 24 and 30 count sizes. The smaller 36 and 48 count celery is commanding a premium due to the lighter volume available. Quality is generally good in all growing regions. We expect to see this market unchanged for the short term.

CHERRIES

Cherry harvest in the Northwest has come to an end. Last week's showers forced growers to harvest the remaining fruit quicker than initially expected. Shippers have limited availability of inventory from the weekend and expect to sell through that product by the middle of the week. Market prices are very firm and quality has been reported as good.



Commodity Updates



CHILI PEPPERS

Anaheim - Sizing and quality remain good. Volume is expected to increase this week from Central California. Excellent size and color.

Pablano - Slightly lighter supply with some growers finishing. Good quality and condition expected to continue.

Tomatillo - Good supply of tomatillo shipping from California. Good color and fresh husk. Good quality over all on tomatillos.

Jalapeño - Good quality on new crop pepper, mostly large sizing with good color.



CILANTRO

The cilantro market is being driven by the lack of supplies from Mexico. Some shippers are finished with harvesting their acreage in Mexico. This is putting the pressure on California to fill the demand. Quality from Mexico is showing black spotting and yellowing of the leaves. Quality from California is nice with minimal yellowing and dehydration.



CITRUS (LEMONS)

The Ventura crop is our main supplier. Demand is stronger than normal and continues to build. We are seeing 165s/200s/235s supplies tighten clean up daily.



CITRUS (LIMES)

The 110ct continue coming down and are nearly the same price as the smaller ones while the 150ct to 250ct are within a dollar of each other. Demand is good on all sizes across the board. Limes are peaking on the 175 and 200ct and the trend is continuing towards larger sizes. Quality is good overall with some leaf shading (yellow color) showing up. The overall supplies are steady. The market is steady on the 175 - 250ct limes.



CITRUS (ORANGES)

Shippers have good supplies of Valencias and peaking on 88s/113s/138s. Starting to see some early demand on 113s and 138s as school demand starts to ramp up over the next few weeks.



CUCUMBERS (EASTERN)

The cucumber market is weaker. Virginia north to New England and west to Ohio and Michigan are all in Production now. A late cool spring and early summer has brought multiple regions together. The larger states like Michigan Ohio and New Jersey are in very good production. Quality seems to be good in all areas. High market the last 2 weeks has slowed movement and we don't expect the market to gain any strength this week.



CUCUMBERS (WESTERN)

Good quality and condition on cucumbers coming out of Northern Baja coast. All sizes are being packed in 11/9 bushel boxes. Also 24's-36's-42's being packed. Color is just fair due to hotter temps.



EGGPLANT (EASTERN)

The eggplant market is tight and good eggplant are even tighter. North Caroling is harvesting but starting to wind down on light acreage. Michigan will start by the end of July but volume will be light for a week to 10 days. New Jersey has started very light volume and will not have volume until the first of August. Expect the eggplant market to stay strong.



EGGPLANT (WESTERN)

With temperature's dropping, eggplant is showing improvement in quality and condition. Fresno showing good quality with limited supply. Cosmetic issue with egg plant are improving.



Commodity Updates



GRAPES (GREEN)

Green grape supplies continue to remain steady coming out of the San Joaquin Valley regions. Quality has been strong, but the weather is warming up again and is expected to reach triple digits for several days in a row. This will be beneficial to production, but can cause some amber coloring on the berries. Although this should have no affect on the eating quality or shelf life, it is something to keep in mind when looking at the green grapes. Markets have declined slightly on all sizes and should remain consistent the rest of the week.



GRAPES (RED)

Arvin red grapes have been very consistent in supply and quality. We are starting to see some bigger sizes in the Flame variety and shippers are expecting to start Scarlet Royals later this week. Market prices have not budged much on high quality M/L to XL grapes. We have seen some more aggressive prices being offered on small size grapes, but quality and inconsistent bunch sizes are a concern.



GREEN ONIONS

Supplies of green onions are steady with aggressive prices for iced product. Iceless green onions are commanding prices at higher levels. Quality has been really nice with minimal yellowing.



KALE

Kale supplies remain abundant. The market is unchanged as well with aggressive prices. Quality is excellent with little yellowing or dehydration.



LETTUCE ICEBERG

The iceberg lettuce market is rising. Demand remains relatively unchanged but supplies are lightening up. We expect this up and down cycle to continue all summer as irregular weather patterns have led to irregular growth

cycles. The roller coaster supply cycle appears to be the norm for now. This situation is only exacerbated by the shippers as they 'reach ahead' on harvests to cover their short falls.



LETTUCE LEAF

Red leaf, green leaf, butter leaf and romaine markets are all flat. We currently have excellent supplies coupled with light but steady demand. We see no change in these market on the horizon as all the regional deals are currently running. The recent nationwide heat wave could affect this but it is too early to tell if this is an issue.



MELON (CANTALOUPE)

The West Side supplies have increased slightly from previous levels. Some growers are packing all sizes including 15ct and a few 18ct while others are packing only 9ct. Quality out of the West Side is excellent with good sugar levels. The market is steady on the 9ct and lower on the smaller 15/18ct right now.



MELON (HONEYDEW)

Growers are harvesting dews in the West Side and the volume is remaining steady right now. Weather has been favorable for high quality honeydews out of the West Side and they are arriving in excellent condition. The market is steady right now.



MELON (WATERMELON)

Demand for Western Watermelon has curtailed. Watermelon is being shipped from Southern and Central California. Quality is good with mostly Large sizes being harvested. Extreme heat has increased the sizing to mostly very large fruit, 30s, 36 and 45s.



Commodity Updates



ONIONS

Central California and New Mexico are still the main two shipping areas for onions. Washington has started with limited supplies of both yellow and red onions. Idaho will start in a very light way next week. New Mexico is still struggling with very limited supplies of Colossal and larger. Both areas are packing good numbers of medium and jumbo's yellow onions. Market is soft on Medium Yellow with all other sizes steady. Quality is still being reported as good. Temperatures in the low 100's continue in the California growing areas this could hurt the quality and supplies as this week moves on.



PEARS

California - Bartlett pears are steady on all sizes and continue to peak on 100/110/90s. Some shippers are priced slightly lower. The quality has been good. Crimson pears are also steady and they are peaking on half carton 45/40s. Full carton Crimson pears are also steady. The quality has been good.

Washington - D'anjou pears are steady but supplies are extremely short and their season is just about over.

Chile - Chilean Bosc are steady to lower and they continue to peak on 70-100s. The quality has been good.



PINEAPPLES

Supplies are dropping from the tropics and are going to be significantly lighter for August.



POTATOES

Idaho - Storage crop is slowly winding down for the season and should be completely done by the second week of August. New Crop will start with a couple growers later this week and with all growers by the second week of August. Quality is still being reported as good to fair on the storage crop. Market is steady all cartons with Non-A bags starting to firm up. New crop will be asking a slight premium on all cartons.

Washington - Growers have all started in a light way with new crop. Sizing and quality is being reported as good. Market came out steady.

Colorado and Wisconsin - Both growing areas have finished with storage crop and have started in a very light way with new crop. Demand is good with limited supplies. Supplies will slowly build and should be up to full speed by the middle of August.



POTATOES (COLORED)

Bakersfield, California - They have finished for the season.

Stockton, California - Reds, whites, and golds are steady to slightly lower and all are peaking on A size. Baker/Premium white and reds are available in varying quantities, large gold potatoes are short! They have good quality for all colors.

Alabama - They have finished for the season.

North Carolina - They have finished for the season.

Virginia - They are steady on all colors but supplies are light. The quality has been fair.

Muleshoe, Texas - The reds are steady on all sizes with good quality, the golds quality has been marginal.

Missouri - They still have a few reds but supplies are light.

Minnesota - They have started packing red and gold potatoes.

Wisconsin - Red potato availability remains light and they continue to peak on B-size with very few As. The quality is good.

Washington - eastern red and gold potatoes are steady and both are peaking on A-size. Bs and smaller are limited in both colors.



Commodity Updates



SQUASH (EASTERN)

The squash market is steady showing a little strength. Production is coming from the mid-Atlantic to New England and west to Michigan. Shippers have quit picking on older fields do to low pricing so volume has decreased enough to push the market slightly higher. We expect a steady market through the week.



SQUASH (WESTERN)

Heavy production on both zucchini and yellow squash are being offered in volume. Sizing is mostly larger due to warm weather. Quality is mostly good but some scarring on certain lots.



STONE FRUIT

Availability on smaller sized stone fruit continues to remain limited. Peaches and nectarines are peaking in the large (TP 48ct and larger) size range with limited availability of volume fill. Market prices on the volume fill fruit have climbed up and are remaining firm. The larger tray pack fruit has seen a small jump in price this week as well. Plums are also peaking in larger sizes, but there is some smaller fruit available if needed. Market prices have been steady on plums and we do not expect to see much change through the week. Quality has been strong on all fruit.



TOMATOES (EASTERN)

Tomato supplies in the east remain fragmented among growing areas with supply limited overall. The lions share of eastern fruit is coming from the eastern shore while other areas east of the Rockies suffer through hot rainy weather conditions bringing regular picking schedules to intermittent harvests. Quality is consistently nice from VA, however local deals in TN and NC are showing scattered quality reports with effects of rain and heat showing up on the crops. Roma tomatoes are very limited in the east leaving buyers to look toward Mexican imports to meet demand. Cherry tomatoes are steady and grape tomato volumes are picking back up as well causing prices to return to seasonal norms from the escalated market experienced the past 2 weeks. Weather has made for a stronger market and with continued showers in the forecast it is unknown how long supplies will run tight.



TOMATOES (WESTERN)

California's gas green tomato crops are experiencing lighter volume this week creating a stronger market. Similarly, vine ripe and roma tomatoes out of Mexico have also shown an up-tick in price due to lighter volumes while production in Baja transitions to Northern growing areas. California's central valley is in the process of switching area crops making romas tomatoes a highly sought after commodity with few crossing from Mexico during the transition north in Baja. Grape production in the west has loosed up with Mexican imports becoming widely available. The cherry market is steady with the majority of the nations volume coming from Maryland and Virginia.



Commodities at a Glance



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

Commodity / Region	Market	Quality
Broccoli		
Salinas Valley, CA	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Celaya Guanajuato Mexico	Steady	Good
Brussels Sprouts		
Salinas Valley, CA	Steady/Higher	Excellent
Oxnard, CA	Steady/Higher	Excellent
Northern Baja California Norte, Mexico	Steady/Higher	Fair
Carrots		
Bakersfield/Santa Maria, CA	Steady	Excellent
Cauliflower		
Salinas Valley, CA	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Celery		
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good
Cherries		
Yakima, WA	Higher	Good
Chili Peppers		
Northern San Joaquin Valley, CA	Steady	Good
Cilantro		
Salinas, CA	Higher	Good
Oxnard/Santa Maria, CA	Higher	Good
Baja, MX	Higher	Fair
Citrus (Lemons)		
Oxnard/Ventura, CA	Steady	Good
Citrus (Limes)		
Veracruz, Mexico	Lower/Steady	Good
Citrus (Oranges)		
Merced to Bakersfield, CA	Steady	Good
Riverside, CA	Steady	Good
Cucumbers (Eastern)		
Ottawa / Kent / Berrien County, MI	Steady	Excellent
Cucumbers (Western)		
Northern Baja California Norte, Mexico	Steady	Good



Commodities at a Glance



Commodity / Region	Market	Quality
Eggplant (Eastern)		
Ottawa / Kent / Berrien County, MI	Higher	Good
Eggplant (Western)		
Fresno, CA	Steady	Good
Grapes (Green)		
Arvin, CA	Lower/Steady	Good
Grapes (Red)		
Arvin, CA	Steady	Good
Green Onions		
Mexicali, Baja	Steady	Good
Salinas Valley, CA	Steady	Good
Kale		
Salinas, CA	Steady	Excellent
Oxnard/Santa Maria, CA	Steady	Excellent
Baja, MX	Steady	Excellent
Lettuce Iceberg		
Oxnard/Santa Maria, CA	Higher	Good
Salinas Valley, CA	Higher	Good
Lettuce Leaf		
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good
Melon (Cantaloupe)		
Firebaugh, CA	Lower/Steady	Excellent
Mendota, CA	Lower/Steady	Excellent
Melon (Honeydew)		
Firebaugh, CA	Steady	Excellent
Mendota, CA	Steady	Excellent
Melon (Watermelon)		
Coachella Valley	Steady	Good
Onions		
Huron/Metler, CA	Steady	Good
Las Cruces, NM	Steady	Good
Quincy/Hermiston, WA	Steady	Good

Commodity / Region	Market	Quality
Pears		
Chile	Steady	Good
Stockton, CA	Steady	Good
Pineapples		
Alajuela, Costa Rica	Steady	Good
Heredia, Costa Rica	Steady	Good
Limon, Costa Rica	Steady	Good
La Ceiba, Honduras	Steady	Good
Retalhuleu, Guatemala	Steady	Good
Peten, Guatemala	Steady	Good
Potatoes		
Hamer/Rupert, ID	Steady/Higher	Good
Quincy/Hermiston, WA	Steady/Higher	Excellent
Monte Vista, CO	Higher	Good
Plover/Bancroft, WI	Higher	Good
Potatoes (colored)		
Stockton, CA	Steady	Good
Hallwood/Horntown/Cape Charles, VA	Steady	Fair
Muleshoe, TX	Steady	Good
Plover, WI	Steady	Good
Big Lake Minnesota	Steady	Good
Pasco/Tri-Cities, WA	Steady	Good
Squash (Eastern)		
Henderson / Bucomb County, NC	Steady/Higher	Fair
Ottawa / Kent / Berrien County, MI	Steady/Higher	Good
Squash (Western)		
Santa Maria, CA	Steady	Good
Stone Fruit		
Madera south to Arvin, CA	Higher	Good
Tomatoes (Eastern)		
Eastern North Carolina	Steady/Higher	Fair
Cedarville/Hammonton, VA	Steady	Good
Tomatoes (Western)		
Coachella Valley, CA	Steady/Higher	Fair
Northern Baja California Norte, Mexico	Steady	Fair

