

Aug 4, 2016

# the source

## Weather Update

The deep upper level low pressure system out west will continue to bring a strong marine layer to the West Coast into next week. The marine layer is expected to deepen into the weekend with drizzle likely in the coastal regions with temperatures slightly below seasonal averages. The southwestern desert region along with Northern Mexico will see seasonal averages and continued monsoonal moisture in the afternoons.

Tropical Storm Earl Currently over northern Guatemala has tracked to the south heading over the high terrain of Guatemala and southeastern Mexico. This will induce rapid weakening as this system continues to track generally to the west. Earl is forecast to weaken into a Tropical depression as it moves into Southern Vera Cruz late Friday. Although Earl is subsiding it is still capable of producing very heavy rains over Central America and Southeastern Mexico.

A couple of moderate cold fronts move into the southeast with periods of rain and thundershowers mainly north of Tampa Bay into the weekend.



## Market Alerts

**Brussels Sprouts:** Brussel Sprouts supplies are starting to tighten up and creating a higher market.

**Grapes (Red):** Flame variety is phasing out. Scarlet Royal and Crimson varieties will start ramping up next week with better sizing.



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## Truckin' Along

California trucks remain steady and look 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 2.348 per gallon. A difference of .320 from this time last year. California prices dropped slightly as well and are currently at 2.741 per gallon. Crude oil is also down this week and is now at 40.87 per barrel.

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

[full history](#)

	07/18/16	07/25/16	08/01/16	Change from	
				week ago	year ago
U.S.	2.402	2.379	2.348	↓ -0.031	↓ -0.320
East Coast (PADD1)	2.411	2.387	2.354	↓ -0.033	↓ -0.415
New England (PADD1A)	2.446	2.434	2.396	↓ -0.038	↓ -0.499
Central Atlantic (PADD1B)	2.503	2.481	2.441	↓ -0.040	↓ -0.444
Lower Atlantic (PADD1C)	2.332	2.306	2.279	↓ -0.027	↓ -0.375
Midwest (PADD2)	2.369	2.341	2.304	↓ -0.037	↓ -0.257
Gulf Coast (PADD3)	2.262	2.242	2.224	↓ -0.018	↓ -0.312
Rocky Mountain (PADD4)	2.435	2.434	2.419	↓ -0.015	↓ -0.266
West Coast (PADD5)	2.686	2.663	2.630	↓ -0.033	↓ -0.276
West Coast less California	2.569	2.536	2.492	↓ -0.044	↓ -0.269
California	2.780	2.764	2.741	↓ -0.023	↓ -0.283

## Transitions & Temperatures

**Berries (Blueberries):** Peru, Argentina and Uruguay blueberries should begin to hit US ports with light volume around the first of September.

**Berries (Raspberries):** Baja California, MX production will begin to increase over the next few weeks.

**Berries (Strawberries):** Santa Maria new crop (Summer planted) strawberries will begin to increase in production over the next several weeks. We will begin to transition to this area as volume increases.

**Onions:** Washington and Idaho have started harvesting New Crop onions.

# Commodity Updates



## APPLES

**Washington** - Red delicious are higher on all sizes and grades with only light availability of fancy-grade fruit. Most shippers continue to peak on extra-fancy 72-88s. Expect the market to remain strong through the balance of the storage season. Earli Golds & Ginger Golds are steady and they peaking on Wash-Extra 88/100/113s. There is very little lower-grade fruit right now. Granny Smith are steady to higher on most sizes and continue to peak on 88-113s. New-crop Galas are limited but are peaking on higher grade 100/88/113s. The quality for C.A. reds, goldens, and granny-smith has been good. The Gala quality has also been good.

**California** - Galas are steady and they are still peaking on smaller fruit but supplies are light. The quality has been good.

**Chile** - Chilean Pinks Ladys are steady but only 70s are available. Chilean Fujis are also steady and peaking on 80-size with more sizes available this week. The import quality has been good.

## ASPARAGUS

Volume from Mexico and Peru are lower. Quality is good from both regions.

## AVOCADO (CALIFORNIA)

California harvest is in its seasonal decline. Harvest volumes are expected to decline significantly this next week. Southern groves are in clean up picking and northern groves are picking early and heavy to get fruit off the tree and take advantage of the market and for the health of the trees. Crop is still skewed towards smaller fruit. Market on 48s and larger remain strong with 60s and 70s weakening due to increased volumes of smaller fruit from Mexico.

## AVOCADO (MEXICAN)

Mexico has backed off slightly on their harvest after a huge harvest week 3 weeks ago. Inventories are growing, and Mexico's harvest has slowed in response to dropping and unstable market pricing.

## BELL PEPPERS (EASTERN)

The green bell pepper market is lower. North Carolina is done in the eastern region, the western part of the state is in good production. New Jersey, Michigan, Ohio and Pennsylvania are all coming into good supplies of new product. Weather across the Northeast last week was very warn with spotty showers. Quality has been good in all areas with few issues.

## BELL PEPPERS (WESTERN)

Bell pepper has moved up to the Central and Southern San Joaquin Valley. Better supply 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. Extreme high temps have dropped in California. Yellow pepper has slightly improved supply with better quality.

## BERRIES (BLACKBERRIES)

Supply is steady with production out of CA, OH, IN, WA and OR. Some growers are gapping and in between varieties out of Oregon. Some deals are being made on the Santa Maria blackberries in order to bring traffic down to load them. Quality is good out of all areas. There have been some isolated instances of wet and leaky berries, also reports of red cell.



# 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 although we will see some late variety Elliot from Washington in a few weeks. Michigan was slow to start again this week due to rain in the Southwestern growing districts and Indiana is producing blueberries steadily. South American blues are about a month away and will start with light volume around the first of September.

## BERRIES (RASPBERRIES)

Supply and availability have improved over recent weeks. Quality has remained good out of all regions, some isolated instances of wet, leaky or light color berries.

## BERRIES (STRAWBERRIES)

Supply is steady with 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 small with berries running 18-28 per 1 pound clamshell. Although there are still a lot of berries in the fields and a lot of flowers indicating more fruit coming, it is taking more berries to fill each clamshell and requiring pickers to cover more ground to do so. Lack of labor is an issue with all growers in all growing regions. Weather forecast for this week is ideal for berries with highs in the low-mid 70s and overnights cooling down around 50 degrees. Order for quick turns on strawberries as we are in the late summer season of the crop and fruit will not last as long.



## BROCCOLI

Broccoli supplies are abundant. The market will be aggressive all week with suppliers offering deals in all growing regions. The quality out of Salinas and Santa Maria is excellent with nice crown size and minimal yellowing. Mexico is showing minimal hallow core and quality is nice as well.

## BRUSSELS SPROUTS

Mexico for the most part is finished with their supplies. This is definitely putting pressure on the current acreage in Salinas and Oxnard. The market is trending higher very quickly. Quality on the domestic product is excellent. Look for this to be the trend well into next week.

## CARROTS

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

## CAULIFLOWER

There are plenty of supplies for this week in both growing regions this week. Lack of demand has kept supplies steady and markets aggressive. Quality from both Salinas and Santa Maria has been really nice with few issues upon arrival.

## CELERY

Pricing is very competitive as production is strong in all growing regions. The best flexing amongst shippers continues on twenty- four counts. Expect flex pricing for the rest of the week, as suppliers do their best to keep inventories clean. Production and quality in Michigan is good. Salinas and Santa Maria production is following the same pattern. Expect good quality and production for the entire week with this commodity.



# Commodity Updates



## CHILI PEPPERS

**Anaheim** - Sizing and quality remain good. Good volume coming out of the San Joaquin Valley. Excellent size and color.

**Pablano** - 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

Supplies from Mexico are extremely limited to a few suppliers. So the pressure continues to be on Oxnard, Santa Maria, and Salinas. But it looks like demand is off and creating a surplus. Prices have leveled out. But Black spotting, yellowing, burn, and seeders are the current quality issues we are still experiencing.



## CITRUS (LEMONS)

The Ventura crop is our main supplier of domestic fruit. Demand is stronger than normal and continues to build. We are seeing 140s/165s/200s/235s supplies tighten clean up daily. Chilean fruit is available is good supplies.



## CITRUS (LIMES)

Lime supplies are tightening, markets reacting upward. Rains in growing area is slowing harvest. Quality is falling off and shippers are having to rerun many lots to clean up the pack of blanching. Shippers are starting to see styler end breakdown that they also trying to clean up in the pack. More wet weather is in the forecast.



## CITRUS (ORANGES)

Shippers have good supplies of Valencias and peaking on 88s/113s/138s. Demand for 113s and 138s is high and increasing as school demand continues to ramp up over the next few weeks.



## CUCUMBERS (EASTERN)

The cucumber market is showing signs of strength. Virginia north to New England and west to Ohio and Michigan are all in production now. Quality has been spotty this past week due to high heat last week. Shippers have given up older fields and are now transitioning to newer ones. Production has decreased slightly and demand has picked up due to retail price declining. Quality should be better next week, temperatures have cooled and rain has been average.



## 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.



## EGGPLANT (EASTERN)

The eggplant market is lower. North Carolina is about finished but New Jersey is in good production and Michigan has started light volume with more coming this weekend. Michigan, Ohio and Pennsylvania should all be in good production next week. Weather the growing regions of Michigan and Ohio has been good. Quality in the newer regions has been very good.



## EGGPLANT (WESTERN)

With hot weather continuing, eggplant is showing condition issues and limited supply. Sizing is mostly large with some medium.



# Commodity Updates



## GRAPES (GREEN)

We have multiple option on green grapes in terms of varieties, size and price. Currently we have the choice of Thompson, Sugarone, Princess and Ivory varieties. We have the whole spectrum of sizes available, but most of the green varieties are peaking in the Large to XL range (12-14 ring size). Quality has been very strong. The Thompson and Sugarone varieties have more range in size and show more amber on the berry in comparison to the other varieties, but market prices reflect the difference.



## GRAPES (RED)

We continue to have good availability on red seedless grapes. We started the San Joaquin Valley season with the Flame variety. Quality has been strong on Flames and markets have been very flat. As we move forward over the next 2 weeks, the Flames will start to phase out. Scarlet Royal and Crimson varieties are just getting started this week. Volume is still limited but is expected to increase by next week. Sizing on the new varieties will bigger with more range. Quality will be excellent. Current pricing on the Scarlet and Crimson varieties is at a premium because of the limited availability and larger sizes. As we move forward and volume increases, we expect the markets to level out on all varieties.



## GREEN ONIONS

Supplies remain abundant from both growing regions. There also have been minimal quality complaints upon arrival. The market will be aggressive all week with deals on iced green onions.



## KALE

Kale supplies are steady from all growing regions. The market will be steady this week as well. There have been minimal complaints of dehydration, size of the bunches, and yellowing upon arrival. Quality has been excellent.



## LETTUCE ICEBERG

This market continues on the flat side. Quality overall is good. The weights have been averaging 40-44 pounds on palletized product. Schools are beginning this week with more to open next week. Business is expected to pick up, so take advantage of low pricing this week. There continues to be a gap in pricing and expect this to continue throughout the week. Expect this market to get stronger by the middle of next week. Suppliers were optimistic for a stronger market this week, but demand simply was minimal, in comparison to harvesting numbers.



## LETTUCE LEAF

Production on all leaf items with most suppliers will continue to be good throughout the week. Minimal mechanical and insect damage is being reported. The weights on romaine are averaging 34-40 pounds. All other leaf items are also having strong reports on good weights and quality. The emergence of school business has suppliers optimistic next week for this market to get active, but this awaits to be seen. Again this is a good time to take advantage of low pricing on all leaf items.



## MELON (CANTALOUPE)

There are really good supplies coming out of the West Side. All sizes are available. Sugar levels are really good right now too. The markets are aggressive even with the increased demand for summer.



## MELON (HONEYDEW)

The West Side has plenty of supplies of honeydews. All sizes are available. Sugar levels are optimum. The market remains aggressive and competitive. Quality is excellent.



# Commodity Updates



## 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. Low production of watermelon still coming out of Arizona and showing light color.



## ONIONS

Central California and New Mexico are still the main growing areas for onions. Both areas have hit their peak production and are slowly winding down for the season. Washington and Idaho have started in a light way with supplies building each week. Market is steady on all colors and sizes which should continue till all supplies are in storages in late September. Quality is still being reported as good. Sizing is smaller out of New Mexico with limited Super Colossal and colossal Yellow onions. Growing conditions have been ideal in Washington and Idaho up until this last week when high temperatures moved into the growing areas.



## PEARS

**California** - Bartlett pears are steady on all wraps while the tight-fills are steady to slightly lower, and they continue to peak on 100/110/90s. Wrapped pear supplies are more limited right now. Most suppliers don't have much smaller than a 120-size. The quality has been good. Crimson pears are steady and continue to peak on half carton 45/40s but supplies are limited, and some suppliers have finished. Bosc are available in limited quantities and they are peaking on smaller fruit. The quality has been good.

**Washington** - Bartlett pears are peaking on 80/90/100s and the market is steady to lower but supplies are still limited. The quality is good.

**Chile** - Chilean Bosc continue to peak on 70-100s but supplies are limited. The quality has been good.



## PINEAPPLES

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



## POTATOES

Demand is moderate on all sizes and packs out of all growing areas. Idaho is down to its last couple of weeks of storage Burbanks which are only left in a few hands. Quality is still being reported as fair to good depending on lot. Market is steady. New crop Norkotah potatoes have started in all growing areas with building supplies. Sizing and quality is being reported as good out of Washington and Idaho except for #2's which is typical. Colorado and Wisconsin have very small potatoes which are peaking on Non-A (retail bag size) currently. Sizing should improve out of these two areas over the next couple of weeks. Market is firm with limited supplies of all cartons out of these two areas.



## POTATOES (COLORED)

**Stockton, California** - Reds, whites, and golds are all steady on all sizes. All colors are peaking on A size but bakers and premiums remain short. The red and white quality is good while the golds are only fair.

**Virginia** - They are steady to lower on A-size for all colors and steady but limited on B-size and smaller. The quality has been good.

**Muleshoe, Texas** - Red potatoes are steady on all sizes but supplies are light. The quality has been good.

**Minnesota** - Red potatoes are steady to slightly lower with good availability. The quality and color have been good.

**Wisconsin** - The red potato market is steady to slightly lower and the availability is improving as they now have more A-size. The quality is good.

**Washington** - Eastern red and gold potatoes are steady and both are peaking on A-size. The quality is good.



# Commodity Updates



## SQUASH (EASTERN)

The squash market is 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 due to low pricing so volume has decreased enough to push the market slightly higher. There are a lot of pockets of squash being produced across the northern tier of the US and southern Canada, quality is generally good in most areas. 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

Not much change in stone fruit. Availability is excellent on large size fruit. Nectarines, Peaches and Plums are all peaking in big sizes. Smaller volume fill fruit is very limited. Quality has been strong. Market prices are starting to climb gradually as the warmer weather continues to push harvest forward. If the weather stays warm, shippers are expecting peaches and nectarines to come to an early finish this year. Plums are expected to be in good supply through fall.



## TOMATOES (EASTERN)

**Rounds** - The market is steady. Supplies are steady with plenty of growing regions. Prices are moderate throughout, with steady markets. Typical August-type business in the East and West. Quality is Good.

**Roma** - The market is steady. Similar to rounds, plenty of growing regions are in production, allowing good, steady supplies. Market looks to be consistent in all regions. Quality is Good.

**Cherry** - The market is steady / lower. 4 main areas are in production, with good supplies. Michigan, Virginia/ Maryland, Baja Mexico, and Central California. There are also smaller local areas in production, with supplies. Quality is Good.

**Grape** - The market is lower. Plenty of supplies in all areas. Shippers looking to move heavy volume. Demand on the light side, giving shippers plenty of hold-over product. Quality is Good to Fair



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# Commodities at a Glance



Commodity / Region	Market	Quality
<b>Apples</b>		
Chile	Steady	Good
Wenatchee/Yakima, WA and Hood River, OR	Steady/Higher	Good
Stockton, CA	Steady	Good
<b>Asparagus</b>		
Central Mexico	Lower	Good
Ica, Peru to Trujillo	Lower	Good
<b>Avocado (California)</b>		
Oxnard/Ventura, CA	Steady	Excellent
<b>Avocado (Mexican)</b>		
Michoacan, Mexico	Steady	Good
<b>Bell Peppers (Eastern)</b>		
Seneca / Summit County, OH	Lower	Good
Ottawa / Kent / Berrien County, MI	Lower	Good
<b>Bell Peppers (Western)</b>		
Southern San Joaquin Valley, CA	Steady/Higher	Good
<b>Berries (Blackberries)</b>		
Watsonville, CA	Steady	Good
Santa Maria, CA	Steady	Good
Sheridan, OR	Steady	Good
<b>Berries (Blueberries)</b>		
Grand Junction, MI	Steady/Higher	Good
Demotte, IN	Steady/Higher	Good
Mossyrock, WA	Steady/Higher	Good
Salem, OR	Steady/Higher	Good
Pitt Meadows, BC	Steady/Higher	Good
<b>Berries (Raspberries)</b>		
Watsonville, CA	Steady	Good
Santa Maria, CA	Steady	Good
<b>Berries (Strawberries)</b>		
Salinas Valley, CA	Steady	Good
Watsonville, CA	Steady	Good
<b>Broccoli</b>		
Salinas Valley, CA	Steady	Excellent
Oxnard/Santa Maria, CA	Steady	Excellent
Celaya Guanajuato Mexico	Steady	Good

Commodity / Region	Market	Quality
<b>Brussels Sprouts</b>		
Salinas Valley, CA	Higher	Excellent
Oxnard, CA	Higher	Excellent
<b>Carrots</b>		
Bakersfield/Santa Maria, CA	Steady	Excellent
<b>Cauliflower</b>		
Salinas Valley, CA	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
<b>Celery</b>		
Michigan	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good
<b>Chili Peppers</b>		
Northern San Joaquin Valley, CA	Steady	Good
<b>Cilantro</b>		
Baja, MX	Steady/Higher	Fair
Oxnard/Santa Maria, CA	Steady/Higher	Good
Salinas, CA	Steady/Higher	Good
<b>Citrus (Lemons)</b>		
Oxnard/Ventura, CA	Steady	Good
<b>Citrus (Limes)</b>		
Veracruz, Mexico	Higher	Fair
<b>Citrus (Oranges)</b>		
Merced to Bakersfield, CA	Steady	Good
Riverside, CA	Steady	Good
<b>Cucumbers (Eastern)</b>		
Ottawa / Kent / Berrien County, MI	Steady/Higher	Good
Seneca / Summit County, OH	Steady/Higher	Good
<b>Cucumbers (Western)</b>		
Northern Baja California Sur, Mexico	Steady	Good
<b>Eggplant (Eastern)</b>		
Ottawa / Kent / Berrien County, MI	Lower	Excellent
Seneca / Summit County, OH	Lower	Excellent
<b>Eggplant (Western)</b>		
Fresno, CA	Steady	Fair



# Commodities at a Glance



Commodity / Region	Market	Quality
<b>Grapes (Green)</b>		
Arvin, CA	Lower/Steady	Good
<b>Grapes (Red)</b>		
Arvin, CA	Steady	Good
<b>Green Onions</b>		
Mexicali, Baja	Steady	Good
Salinas Valley, CA	Steady	Good
<b>Kale</b>		
Salinas, CA	Steady	Excellent
Oxnard/Santa Maria, CA	Steady	Excellent
Baja, MX	Steady	Excellent
<b>Lettuce Iceberg</b>		
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good
<b>Lettuce Leaf</b>		
Salinas Valley, CA	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
<b>Melon (Cantaloupe)</b>		
Firebaugh, CA	Steady	Excellent
Mendota, CA	Steady	Excellent
<b>Melon (Honeydew)</b>		
Firebaugh, CA	Steady	Excellent
Mendota, CA	Steady	Excellent
<b>Melon (Watermelon)</b>		
Central California	Steady	Good
<b>Onions</b>		
Huron/Metler, CA	Steady	Good
Las Cruces, NM	Steady	Good
Quincy/Hermiston, WA	Steady	Fair
Ontario, OR to Nampa, ID	Steady	Fair
<b>Pears</b>		
Wenatchee/Yakima, WA and Hood River, OR	Steady	Good
Stockton, CA	Steady	Good
Chile	Steady	Fair

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
Monte Vista, CO	Higher	Good
Plover/Bancroft, WI	Higher	Good
<b>Potatoes (colored)</b>		
Stockton, CA	Steady	Good
Hallwood/Horntown/Cape Charles, VA	Steady	Good
Big Lake Minnesota	Lower/Steady	Good
Plover, WI	Lower/Steady	Good
Pasco/Tri-Cities, WA	Steady	Good
Muleshoe, TX	Steady	Good
<b>Squash (Eastern)</b>		
Ottawa / Kent / Berrien County, MI	Steady/Higher	Good
Seneca / Summit County, OH	Steady/Higher	Good
<b>Squash (Western)</b>		
Santa Maria, CA	Steady	Good
<b>Stone Fruit</b>		
Madera south to Arvin, CA	Steady/Higher	Good
<b>Tomatoes (Eastern)</b>		
Cedarville/Hammonton, VA	Steady	Good
Benton Harbor/Byron Center, MI	Steady	Good
<b>Tomatoes (Western)</b>		
Northern Baja California Sur, Mexico	Steady	Good
Coachella Valley, CA	Steady	Good
Southern California Coast	Steady	Good

