

Aug 11, 2016

# the source

## Weather Update

High pressure will bring a slight warm up to the west coast into next week with lighter marine layer conditions over the weekend. Near average temperatures are expected in most locals. Moderate showers continue in Central and Northern Mexico with another surge of monsoonal moisture expected over the weekend will keep temperatures near seasonal averages. High pressure in the southeast pushes the storm track north of Florida into the weekend with diminishing shower activity expected



## Market Alerts

- Berries (Blueberries):** Production is coming off and supplies are quickly tightening up.
- Cilantro:** Quality issues still exist and the markets remain high.
- Grapes (Red):** Flame variety is phasing out and new varieties will take it's place. Bigger full color grapes will be available, but market prices are climbing.
- Stone Fruit:** Small size volume fill fruit is very limited. Advance orders are recommended.





## Truckin' Along

California trucks remain steady and look to remain that way again this week. Washington and Idaho potato trucks remain steady as well. The National Average for diesel dropped slightly and is currently at 2.316 per gallon. A difference of .301 from this time last year. California prices dropped slightly as well and are currently at 2.707 per gallon. Crude oil remained steady and is now at 41.51 per barrel.

U.S. On-Highway Diesel Fuel Prices\* (dollars per gallon) [full history](#)

	07/25/16	08/01/16	08/08/16	Change from	
				week ago	year ago
U.S.	2.379	2.348	2.316	↓ -0.032	↓ -0.301
East Coast (PADD1)	2.387	2.354	2.321	↓ -0.033	↓ -0.392
New England (PADD1A)	2.434	2.396	2.378	↓ -0.018	↓ -0.469
Central Atlantic (PADD1B)	2.481	2.441	2.412	↓ -0.029	↓ -0.420
Lower Atlantic (PADD1C)	2.306	2.279	2.241	↓ -0.038	↓ -0.354
Midwest (PADD2)	2.341	2.304	2.275	↓ -0.029	↓ -0.240
Gulf Coast (PADD3)	2.242	2.224	2.184	↓ -0.040	↓ -0.303
Rocky Mountain (PADD4)	2.434	2.419	2.396	↓ -0.023	↓ -0.244
West Coast (PADD5)	2.663	2.630	2.595	↓ -0.035	↓ -0.251
West Coast less California	2.536	2.492	2.454	↓ -0.038	↓ -0.252
California	2.764	2.741	2.707	↓ -0.034	↓ -0.253

## Transitions & Temperatures

**Berries (Blueberries):** Peru, Argentina and Uruguay blueberries should begin to hit US ports with light volume by the end of August. Some growers are already picking fruit and have mentioned airfreighting some blueberries even earlier than expected, first air shots possibly hitting this weekend or early next week.

**Berries (Strawberries):** Santa Maria has just begun packing their new (summer planted) fall crop. Volume is limited out of the area so far. Sizing is in the high teens to low twenties. Fruit is firm with some white shoulders and green tips and salmon (overall lighter color.) Grower/shippers are charging a premium for the new crop berries.

**Onions:** Supplies transitioning back north to Idaho and Washington



# 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 but supplies are light due to strong demand. 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. Supplies of the lower-grade fruit are limited. Granny Smith are steady to higher on most sizes and continue to peak on 88-113s. New-crop Galas are still limited due to strong demand but supplies are improving as more shippers get started. The Galas are peaking on higher grade 100/88/113s. The quality for C.A. reds, goldens, and granny-smith has been good. The new-crop Gala quality has also been good.

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

## ASPARAGUS

Volume from Peru is lower. Central Mexico is almost done while Northern Baja, Mexico has just started.

## AVOCADO (CALIFORNIA)

California harvest is still on pace with its seasonal decline. Harvest volumes are expected to decline significantly this 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 continues to struggle at its current pace when it comes to harvesting their acreage. Inventories are steadily growing at a slow pace however. Unstable market pricing continues this week as supplies are dictating the price levels.

## BELL PEPPERS (EASTERN)

The green bell pepper market is lower. There is good production of Bell pepper being produced from the Mid Atlantic to the Northeast and west to Michigan. The whole northern part of the US is in good supply of green pepper and with so much local product demand has fallen significantly. Weather in Michigan and Ohio should be conducive for good production the remainder of the week, the northeast though will likely see some interruption due to rain.

## BELL PEPPERS (WESTERN)

Bell pepper's are now coming out of the Central and Southern San Joaquin Valley. Better supply on Green and Yellow bells than Red bells. Red bells are becoming short and 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. Red bells are still limited and should remain limited for the remainder of the week.

## BERRIES (BLACKBERRIES)

Production is trending down and supply is tightening. Demand has been steady but getting stronger. Quality is good overall but there have been a few reports of overripe and red cell.



# Commodity Updates



## BERRIES (BLUEBERRIES)

Domestic production is slowing down out of the Pacific Northwest and the Upper Midwest. Rain events and warm weather over the past few weeks have affected production in both regions - quality and availability. Volume is winding down out of both areas. Availability is less than previous weeks and markets continue to strengthen. Overall, quality has been fair to good. We have seen some shrivel, wet and mold in lots that were previously exposed to weather, etc. and seeing good fruit in other lots.



## BERRIES (RASPBERRIES)

Supply and demand are both steady. Production is expected to start coming off next week and will continue to decline until the Central Mexican deal picks up at the end of September. Quality has been good overall.



## BERRIES (STRAWBERRIES)

Production has slowed down in Salinas and Watsonville. Cooler weather is reducing the harvest estimates and lack of labor is slowing down the harvesting of ripe fruit. Berries are running smaller, 18-28 berries per 1 pound clamshell. Therefore, it is taking more berries to fill each clamshell and pickers are covering more ground to do so as well. Quality has been good overall but we have received some reports of light bruising and overripe fruit as well.

It is imperative that the cold chain be maintained from loading until end user delivery, berries should be held at 32-34 degrees continuously. Any exposure to warmer temps will accelerate decay and increase severity of bruising. Expectations of quality must also be adjusted as we are late in the summer season and fruit will not be as strong as you are used to. Order for quick turns and do not get long on berries.



## BROCCOLI

The broccoli market remains flat at current price levels. Supplies are plentiful from all growing regions. There have been minimal quality reports such as hollow heart from Mexico and yellowing out if California.



## BRUSSELS SPROUTS

Now that Mexico has finished with their season, the pressure is on California. The market is strong but steady at the current price level. Quality is excellent with no arrival issue to report.



## CARROTS

The Bakersfield crop continues to be in full production. Growth is good and producing good percentage of Jumbo size and supplies are good. Supply of baby peeled carrots are good. The market remains steady at current price levels from last week.



## CAULIFLOWER

Supplies are starting to decrease. Some suppliers have raised their prices today. Look for this market to trend higher starting next week. Quality still remains very nice with little complaints upon arrival.



## CELERY

This market is steady and very competitive in all growing regions. Overall quality is very good. Large sizing continues to have the best availability. Production in Michigan as well as Salinas and Santa Maria should have strong quality throughout the week. Shippers continue to flex on large volume type orders, especially on large sizing.



# 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.

Quality and Condition are good overall. With rain hitting Baja, California supply has shortened and market will begin to creep up.



## CILANTRO

Cilantro quality is dictating this market. Quality arrivals from product grown in Oxnard and Mexico have been yellowing, black slimy decay, to seeders. This has put pressure on the Salinas Valley but they do not have the acreage to cover demand. Supplies remain limited from all growing regions.



## CITRUS (LEMONS)

The market overall is stronger with small fruit (165 and smaller) being especially scarce. Small lemons will continue to command a premium as we move further into the season. Quality overall is reported as good with few issues being reported.



## CITRUS (LIMES)

The larger 110ct and 150ct are less expensive than the smaller sizes. Demand is good on all sizes across the board. Limes are peaking on the 150ct now. Quality is good overall with some leaf shading (yellow color) showing up. The overall supplies are lower than previous weeks and the trend looks to continue in this direction for the next few weeks. The market is higher on the limes and prices look to continue increasing.



## CITRUS (ORANGES)

The Valencia orange market is steady to higher with small fruit (113's and 138's) climbing strongly. Light supplies of small fruit and increased demand from school districts around the country are driving this market. Quality continues to be reported as good.



## CUCUMBERS (EASTERN)

The cucumber market is higher. Cucumber supply is coming from Virginia to New England and west to Michigan. Shippers have dropped older fields due to quality issues and are transitioning to newer ones this week. Quality is getting better this week and there is good demand for number one product, off grade product has not reacted as fast but is starting to pickup as the week goes on. Michigan is not getting good yields and there is some rain along the east coast that will keep supplies tight for the weekend.



## 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. With rain's in Baja, California availability has dropped slightly which has perked the market up slightly. Demand is starting to become stronger.



## EGGPLANT (EASTERN)

The eggplant Market is steady. Michigan has started to pickup a little volume and New Jersey is in steady volume. Those are the two biggest supply regions this time of year. There is some supply from Ohio, Virginia and Pennsylvania. With the west being very short on supply some of the pressure on east coast shippers has been lowered. We expect a steady market through the week.



## EGGPLANT (WESTERN)

Quality and condition on eggplant has become better coming out of Fresno. Minimal cosmetic issue's like scaring being shown. Showing green calyx on all size's. Volume has increase on all sizing.





# Commodity Updates



## GRAPES (GREEN)

We continue to have excellent supplies of green grapes. Multiple varieties are available with a wide range of color and sizes to choose from. Market prices have been steady on green grapes and quality has been very strong. We do not expect to see much change in price, supply or quality as we move into next week.



## GRAPES (RED)

Excellent supplies of red grapes. The Flame variety is coming to an end and will be wiped out by next week. Any aggressive market prices will be on the remainder of this variety. As the Flames phase out, new varieties will be in abundant supplies. Crimson, Magenta and Scarlet Royal will be the main varieties moving forward. These varieties are producing a larger full color grape. Market prices on the new varieties are slightly higher and shippers are trying to maintain that escalated level. I expect next week we will see firm prices.



## GREEN ONIONS

The green onion market continues to be at lower price levels. Iceless is commanding a premium over the iced product. Supplies are abundant. Minimal quality issues have been reported.



## KALE

Kale supplies are abundant from all growing regions. This is keeping the market at a steady pace. Quality has been excellent with nice green color and full bunches.



## LETTUCE ICEBERG

Supplies will continue to be strong throughout the week with most suppliers. There continues to be gaps in pricing seen in the industry. The weights have been averaging 42-48 pounds on palletized. As school business kicks in, expect processors to be more aggressive in purchasing raw

material. This will inevitably lower supplies on the carton business. Markets are expected to be stronger next week. The overall quality on this commodity has been good. Pricing is competitive.



## LETTUCE LEAF

Shippers continue listening to offers as demand is off. Slight mildew and mechanical damage has been reported in a light way. Overall, the quality from most suppliers are reported as above average. The weights on romaine continue to average 35-38 pounds. All other leaf items are also having strong reports on good weights as well. Take advantage of low pricing on all leaf items. Expect this market to be stronger next week.



## MELON (CANTALOUPE)

The supplies are holding steady but demand has weakened. The market is lower across the board right now. Many of the growers are packing 9ct through 15ct with a few packing 18ct. 9ct supplies are not as plentiful as the 12ct or 15ct. Quality out of the West Side is excellent with good sugar levels.



## MELON (HONEYDEW)

Growers are harvesting steady supplies of honeydews currently. Demand has weakened a bit from earlier levels which is causing the market to be slightly lower than it was earlier this week. Weather has been favorable for high quality honeydews out of the West Side and they are arriving in excellent condition.



## MELON (WATERMELON)

Seedless Watermelon supply has dropped. Extreme heat in the last few months brought most of the crop to harvest. The current availability is limited and offering medium to smaller sizes. Mostly 60 size fruit being offered.



# Commodity Updates



## ONIONS

Supplies of all color of Onions are starting to transition from California/New Mexico to Idaho/Washington. New Mexico Onion growing areas were hit with heavy rain early Wednesday morning. Most shippers have plenty of onions in their packing sheds and with the light demand we should not feel any shortages. New Mexico and California will finish for the season over the next couple weeks as buyers focus their buying on Idaho and Washington. Quality is still being reported as good out of all areas. Idaho and Washington are reporting good quality and sizing right out of their first fields. Look for the markets to be soft at lower levels till everything gets into storage in early September.

## PEARS

**California** - Bartlett pears are steady on all sizes and they continue to peak on 100/110/90s . Wraps are still more limited than tight-fills. Most suppliers don't have any fruit 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 short. Bosc are available in limited quantities and they are peaking on smaller fruit. The quality has been good.

**Washington** - Bartlett pears are still peaking on 80/90/100s. The market is steady to lower on most sizes but the availability is improving as more suppliers get in. The quality is good.

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

## PINEAPPLES

Tropical supplies are short and will remain light through August and possibly into September. Expect the strong market to last until supplies loosen up.

## POTATOES

New crop potatoes are available from all growing areas ( Idaho, Washington, Colorado and Wisconsin). Idaho and Washington currently have good sizing which is peaking on 70 count. Both areas are reporting great quality. Market is steady. Colorado and Wisconsin are having issues due to their first few fields having very small size profiles which are peaking 100 count and smaller. This size profile will slowly get better over the next couple weeks. Quality is being reported as good. Market is firm with limited to no availability of all sizes of cartons.

## POTATOES (COLORED)

**Stockton, California** - Reds, whites, and golds remain steady and all colors continue to peak on A size. Baker and premium whites and golds remain short. The red and white quality is good while the golds have ranged from good to fair with some enlarged lenticle.

**Virginia** - They have finished for the season.

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

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

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

**Washington** - Eastern red potatoes are steady and are peaking on A-size. Some suppliers have finished with golds for the short term. The quality is good.

**Delaware** - They have good availability on red, white, and gold A and B size with some premium and bakers as well. The quality has been good.



# Commodity Updates



## SQUASH (EASTERN)

The squash market is higher on green and steady on yellow. With growers leaving older fields due to quality and cheap markets, supply on squash is lower. Demand for green squash has picked up while quality issues on yellow have held that market in check. Quality should get better as the week goes on. Weather could slow production in the northeast but Michigan should see good production this week. We do expect the squash market to remain snug this weekend.



## SQUASH (WESTERN)

Production on both Italian and yellow squash are being offered in volume. Sizing is mostly larger due to warm weather. Quality is mostly good and improving, minimal scarring and certain lots. Quality will continue to improve as weather gets cooler. Demand has picked up.



## STONE FRUIT

Stone fruit continues to be readily available in large sizes only. Peaches, nectarines and plums are all big. As school business begins to pick up and the demand for small fruit increases, it will become more difficult to fill same day and next day orders. I highly recommend getting volume fill stone fruit orders in advance so the shipper can pack and allocate product accordingly. Quality remains strong and market prices are climbing as availability become more limited on small fruit.



## 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. With Schools back on-line, look for demand to begin to tick upward. 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>		
Wenatchee/Yakima, WA and Hood River, OR	Steady/Higher	Good
Chile	Steady	Good
Stockton, CA	Steady	Good
<b>Asparagus</b>		
Ica, Peru to Trujillo	Higher	Good
Central Mexico	Higher	Good
<b>Avocado (California)</b>		
Oxnard/Ventura, CA	Steady	Good
<b>Avocado (Mexican)</b>		
Michoacan, Mexico	Steady	Excellent
<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/Higher	Good
Santa Maria, CA	Steady/Higher	Good
Sheridan, OR	Steady/Higher	Good
<b>Berries (Blueberries)</b>		
Salem, OR	Higher	Good
Mossyrock, WA	Higher	Good
Pitt Meadows, BC	Higher	Good
Demotte, IN	Higher	Good
Grand Junction, MI	Higher	Good
<b>Berries (Raspberries)</b>		
Watsonville, CA	Steady	Good
Santa Maria, CA	Steady	Good
<b>Berries (Strawberries)</b>		
Salinas Valley, CA	Steady/Higher	Good
Watsonville, CA	Steady/Higher	Good
Santa Maria, CA	Higher	Good
<b>Broccoli</b>		
Salinas Valley, CA	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Celaya Guanajuato Mexico	Steady	Good

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



# Commodities at a Glance



Commodity / Region	Market	Quality
<b>Grapes (Red)</b>		
Arvin, CA	Higher	Excellent
<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>		
Oxnard/Santa Maria, CA	Steady	Good
Salinas Valley, CA	Steady	Good
<b>Melon (Cantaloupe)</b>		
Mendota, CA	Lower	Excellent
Firebaugh, CA	Lower	Excellent
<b>Melon (Honeydew)</b>		
Mendota, CA	Lower	Excellent
Firebaugh, CA	Lower	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	Good
Ontario, OR to Nampa, ID	Steady	Good
<b>Pears</b>		
Wenatchee/Yakima, WA and Hood River, OR	Steady	Good
Stockton, CA	Steady	Good
Chile	Steady	Good

Commodity / Region	Market	Quality
<b>Pineapples</b>		
Alajuela, Costa Rica	Steady/Higher	Good
Heredia, Costa Rica	Steady/Higher	Good
Limon, Costa Rica	Steady/Higher	Good
La Ceiba, Honduras	Steady/Higher	Good
Retalhuleu, Guatemala	Steady/Higher	Good
Peten, Guatemala	Steady/Higher	Good
<b>Potatoes</b>		
Hamer/Rupert, ID	Lower/Steady	Excellent
Quincy/Hermiston, WA	Steady	Excellent
Eastern Colorado	Steady/Higher	Good
Plover/Bancroft, WI	Steady/Higher	Good
<b>Potatoes (colored)</b>		
Stockton, CA	Steady	Good
Big Lake Minnesota	Lower/Steady	Good
Ider, AL	Steady	Good
Muleshoe, TX	Steady	Good
Plover, WI	Steady	Good
Pasco/Tri-Cities, WA	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>		
Southern San Joaquin Valley, CA	Steady/Higher	Good
<b>Stone Fruit</b>		
Madera south to Arvin, CA	Steady/Higher	Good
<b>Tomatoes (Eastern)</b>		
Benton Harbor/Byron Center, MI	Steady	Good
Cedarville/Hammonton, VA	Steady	Good
Eastern North Carolina	Steady	Good
<b>Tomatoes (Western)</b>		
Northern Baja California Norte, Mexico	Steady	Good
Coachella Valley, CA	Steady	Good
Northern Sonora, Mexico	Steady	Good

