



# WEEKLY MARKET REVIEW

May 2, 2019

## OVERVIEW

We are almost done with transition. Celery remains in an **EXTREME** situation; smaller-sized lemons are also **EXTREME**. Strawberries and blackberries are plentiful.

## MARKET ALERTS



AVOCADO - ESCALATED



BRUSSELS SPROUTS - EXTREME



CABBAGE (RED) - ESCALATED



CAULIFLOWER - ESCALATED



CELERY- EXTREME



LEMONS (SMALL SIZES) - EXTREME



LIMES - ESCALATED



ONIONS (WHITE & RED) - EXTREME

## TRANSPORTATION & WEATHER



Freight rates continue to be above average and available trucks are limited. Mexico is experiencing a National Fuel Shortage due to alleged corruption. We have not seen this affect supply crossing into the United States quite yet, but it could affect imports over the next several weeks. We will keep you informed when we have updates.

### COACHELLA:

Thu 5/2	Fri 5/3	Sat 5/4	Sun 5/5	Mon 5/6	Tue 5/7	Wed 5/8
93°   66° F	98°   67° F	99°   63° F	92°   61° F	82°   61° F	87°   62° F	90°   63° F
Partly Cloudy	Sunny	Sunny	Sunny/Wind	Mostly Sunny	Mostly Sunny	Mostly Sunny

### CULIACAN:

Thu 5/2	Fri 5/3	Sat 5/4	Sun 5/5	Mon 5/6	Tue 5/7	Wed 5/8
98°   63° F	95°   59° F	98°   59° F	96°   60° F	96°   58° F	97°   59° F	96°   59° F
Mostly Cloudy	Partly Cloudy	Mostly Sunny	Sunny	Sunny	Sunny	Sunny

### WIMAUMA:

Thu 5/2	Fri 5/3	Sat 5/4	Sun 5/5	Mon 5/6	Tue 5/7	Wed 5/8
84°   70° F	86°   69° F	89°   71° F	88°   71° F	88°   70° F	87°   68° F	89°   68° F
PM Thunderstorms	AM Thunderstorms	Partly Cloudy	Scattered Thunderstorms	PM Thunderstorms	Isolated Thunderstorms	PM Showers

# WEEKLY MARKET REVIEW

## SALINAS:

Thu 5/2	Fri 5/3	Sat 5/4	Sun 5/5	Mon 5/6	Tue 5/7	Wed 5/8
69°   48° F	67°   48° F	63°   51° F	62°   51° F	64°   52° F	65°   51° F	67°   52° F
						
Sunny	Partly Cloudy	Mostly Sunny	Cloudy	AM Clouds/PM Sun	Mostly Sunny	Partly Cloudy

## GOOD BUYS

Each week, our team spotlights commodities based on how favorable prices, quality, and supply are in the market. Stay ahead of the trends and look to these good buys for their stellar performance in the fields! Please see each individual product for more information below and reach out to your PA representative for order guide information.

Commodity	Market Update	Produce Expert Tip
<b>Pineapple</b>	Quality is very good right now	Dreaming of a tropical vacation but stuck at work? Combine sweet and delicious pineapple chunks with bananas, oranges, mangoes, papayas, kiwifruit, and raspberries for a mouthwatering, refreshing treat that you can enjoy even while sitting at your desk on a rainy Tuesday!
<b>Romaine</b>	Quality is good and the product is looking clean	Romaine's vitamin C and beta-carotene content make it a heart-healthy green. Use it to give your sandwiches extra crunch (and nutrients), or, for something a little different, arrange nuts, diced vegetables, chicken (and/or baked tofu), and romaine lettuce leaves on a large plate. Create your own bread-less lettuce wraps by filling your romaine leaf with your favorite fillings for a fun, interactive meal.

## FRUITS & VEGETABLES



**AVOCADOS WATCH LIST** The avocado market continues to fall in price. After the Holy Week shut down, the pipeline is filled with fruit. There could be some older fruit out there that is ready to turn; quality is okay at this point, due to the mixture of old and new fruit in the market.



**BANANAS** Markets remain steady with consistent production and supply. Fruit quality is not an issue at this time.



**PINEAPPLES** Pineapple markets are trending towards smaller sizes. We are expecting to see less 5s and more 7s and 8s for the next 2 months. Quality is very good right now; climate in Costa Rica has improved, which is optimal for maintaining good quality.



**GRAPES** Red Seedless—Some shippers have weaker quality and are cutting some deals. Allison and Timco are around, as well as Sweet Celebration. Those varieties are trying to get higher money, but there are still a good amount of crimsons holding the market lower. Green Seedless—Mix of quality out there. Some getting repacked. Demand seems to be ok.



**KIWIS** Good Supply available on Chilean product.



**BLUEBERRIES** Supply will be low for the next couple of weeks and then begin to increase.



**BLACKBERRIES** We anticipate lower volume in the upcoming weeks. CA volume should increase in late May.



**RASPBERRIES** Raspberries are lower than forecasted; volume is really tight and expected to be so moving forward. Pricing will increase for the next few weeks.



**STRAWBERRIES** The strawberry market is good, and quality is getting good. We expect volume to increase at a steady rate as the Northern District and Santa Maria are ramping up.

## CALIFORNIA-ARIZONA CITRUS



**GRAPEFRUIT** Star Ruby Grapefruit is available. Fruit is excellent.



**LEMONS EXTREME** As a result of the unprecedented amount of rain this winter, lemons have grown extremely large. We are noticing that the fruit is two sizes bigger than it should be (165s are now 115s). At this time, Produce Alliance is in a position where we are not receiving enough 140ct and smaller sized lemons. Going forward, please know that we may need to substitute 95 and 115s as these sizes are readily available.



**LIMES (PERSIAN) ESCALATED** Supply remains tight due to lower volume crossing through the border as a result of weather issues in Mexico.

# WEEKLY MARKET REVIEW



**ORANGES** Navels are steady with good supply of fruit. We are seeing more 88s and 72s choice. We should have fruit into early-to-mid-June.

**Imports/Specialties available:**

- Blood Oranges
- Cara Caras
- Sun Delite
- Gold Nugget
- Ojai Pixie
- Minneola

## WEST COAST LETTUCE

---



**GREEN & RED LEAF**

**Green Leaf:** Supply is slightly above normal. We are seeing a bit of mildew, but nothing too concerning. Demand is good.

**Red Leaf:** Supply and quality are good.



**BUTTER** Supply and quality are good.



**ICEBERG LETTUCE** Supply is good this week, not too heavy or light. The weather is predicted to be cooler than normal and that could push back supply. Demand is expected to increase with Mother's Day pull. Quality is very good, and the market could go a little higher since there is lighter supply and high demand.



**ROMAINE** Supply is slightly above normal and will continue to be for the next three weeks. Quality is good and the product is looking clean. Weights are hovering around 34-36lbs.



**ROMAINE HEARTS** Supply this week is normal and will continue to be for the next three weeks. Weights on the 12x3s have been in the 21-23lb range, with 48ct coming in at 27-31lbs.

## EASTERN & WESTERN VEGETABLES

---



**PEPPERS**

**Green Bell Pepper:** Green bell prices continue to see a price drop. All three regions--Florida, California, and Mexico--are seeing better supply. Florida supply will continue to be strong until mid-May when it moves to Georgia. California is ramping up as Mexico is nearing the end of their crop. Quality is mostly good, with some reports of the old crop in Mexico having issues.

**Red Bell Pepper:** Red bell prices are down this week as supply begins to improve. Canada has ramped up production, while Mexico hothouses start to wind down. Quality is mostly good, but there are still some color issues popping up.

**Yellow Pepper:** The yellow pepper market has turned back around as numbers are falling short crossing through Nogales. We expect a three-week active market and should see relief once Baja ramps up.

**Mini Sweet Pepper:** Good supply for the next several weeks. Demand is better.

**Mixed Chili Pepper:** Chili supply has become a little snug this week. More product should be available in time for Cinco de Mayo demand. Quality is best from Sonora's growers, but Sinaloa's product may have some quality challenges. In the East, Plant City's production hit a soft spot, but there is more product on the way and quality is nice. Georgia will also join in in 3-4 weeks.



**EGGPLANT** Eggplant prices look to be steady for the week. Volumes continue to be good, as some fields are nearing the end of their harvests. There have been scarring issues reported in the fields.



**CUCUMBERS** Cucumbers continue to drop in price. Both Florida and Mexico continue to see strong production. Quality is mostly good, with some hiccups seen in the Mexico crop.



**ENGLISH CUCUMBERS** There is a steady supply available through Nogales and Canada. Volume deals are being made.



**GREEN BEANS** The green bean market is mixed this week. Imported haricot verts are down, with moderate supply and demand. Machine-picked product out of Florida is up, with light supply and good demand; this growing region is winding down. Hand-picked product out of Coachella Valley California is up, with light supply and moderate demand. Hand-picked product out of Mexico is down, with lighter supply and demand. Quality will vary depending on the growing region.



**ZUCCHINI AND YELLOW SQUASH WATCHLIST** Yellow squash prices continue to jump up. Light harvests in Mexico and Florida are causing supply to be tight. Georgia is expected to start production in the next week or two. Mexico is expecting Sonora to come on board soon, which hopefully will help supply. Quality continues to be a struggle, but new

# WEEKLY MARKET REVIEW

fields bring hope. Zucchini prices are up slightly this week. Supply has tightened up a little bit, but not as tight as the yellow squash. Quality is mostly fair, with most of the issues seen in yellow squash.



## MELONS

**Cantaloupe:** Decreasing arrivals for the offshore cantaloupes over the past two weeks has caused the market to spike. With local melons in Florida beginning and domestic melons in Arizona prepared to start within the next 10-14 days, we anticipate the market will settle from its highs. Sizing is projected to have a nice mix of regular cartons rather than the jumbo fruit that was seen throughout April. Quality has been outstanding the past couple of weeks. Brix averages are increasing as we get deeper into the Spring crop.

**Honeydew:** Honeydew production continues to be strong. Primary sizing is 5s and larger, but there are still decent numbers on 6/8s finding their way into the market, enabling us to cover all orders. Honeydews will also keep going through at least the week of May 20<sup>th</sup>. With fruit being so big, internal quality has been very good with increased yields as well.



## HERBS

**BASIL** supply continues to improve locally, and we should be in full swing by the first week of May. All other fresh herbs are steady.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Good	USA
Basil	Steady	Good	USA/MEXICO
Opal Basil	Steady	Good	USA
Thai Basil	Steady	Good	USA
Bay Leaves	Steady	Fair	COLOMBIA/USA
Chervil	Steady	Good	USA
Chives	Steady	Good	MEXICO
Cilantro	Steady	Good	USA
Dill	Steady	Good	USA
Epazote	Steady	Good	MEXICO
Lemongrass	Steady	Good	USA
Marjoram	Fair	Fair	MEXICO
Mint	Steady	Good	USA
Oregano	Steady	Good	USA
Italian Parsley	Steady	Good	USA
Rosemary	Steady	Good	USA
Sage	Steady	Good	USA
Savory	Steady	Good	USA
Sorrel	Steady	Good	USA
Tarragon	Steady	Good	USA/MEXICO
Thyme	Steady	Good	USA
Lemon Thyme	Steady	Good	USA
Lavender	Steady	Good	USA
Lime Leaves	Steady	Good	USA



**ARTICHOKES** Supply industry-wide is fair. Demand is fair and prices are steady to higher.



**ARUGULA** Supply and quality are good.

# WEEKLY MARKET REVIEW



**ASPARAGUS** Growing region has changed to Peru; Mexico is done for the season. Quality is good, market is steady, and good volume is available.



**BOK CHOY** 50# are in short supply and prices are up.



**BROCCOLI / BROCCOLI FLORETS** Supply is lighter this week.



**BRUSSEL SPROUTS EXTREME** Very light availability; we are seeing shortages in supply.



**CABBAGE (GREEN)** Supply is good with available loading through Texas.



**CABBAGE (RED) ESCALATED** Supply continues to be light.



**CARROTS** Carrots are improving. Supply now available in Georgia as well.



**CAULIFLOWER: ESCALATED** Supply will be very light this week.



**CELERY EXTREME** We will have light volume from Mexico this week. The weather has warmed up slightly, but sizing is better out of Mexico. We are still seeing extremely high open-market prices.



**CORN** The market ticked up a tad, but there is still good supply and good quality out of Florida and Mexico.



**CILANTRO** Quality is improving and supply is good.



**FENNEL** Supply on fennel will be short for the next few weeks due to frost damage and the Yuma season finishing with light supply. We will continue to see a majority of smaller fennel--18s and 24s will remain limited.



**GARLIC:** Supply is firming up and markets are active.



**GINGER** Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Peru and Thailand.



**GREEN ONIONS** Demand, supply, and quality are good.



**JICAMA** Steady supply crossing through Texas.



**KALE (GREEN)** Supply and quality are fair.



**MACHE** Availability is adequate.



**MUSHROOMS** Mushroom growers are still recovering from the severe damage in the South and Southeast, as well as Puerto Rico. Hurricane Harvey and Irma have resulted in a tightening market, and the American Mushroom Institute has said it expects supply to be affected for several months. We are starting to see some improvement of supply and will keep you informed of any changes.

# WEEKLY MARKET REVIEW



**NAPA** Quality and supply are fair.



**RAPINI** Supply has improved and markets are down. Quality has improved.



**PARSLEY (CURLY, ITALIAN)** Quality is fair to good. Supply is steady.



**RADISHES** Markets are firming up due to heavy precipitation and wind damage to fields. We see FOB pricing ticking up.



## **SUGAR SNAP PEAS & SNOW PEAS**

**Sugar Snap Peas:** Supply is extremely tight, quality is good, and volume should increase in the next week.

**Snow Peas:** Supply is increasing, quality is good.



**BABY SPINACH** Supply and quality are good.



**BUNCHED SPINACH** Quality and supply are good.



**SPRING MIX** Supply and quality are good.



**SWEET POTATOES AND YAMS WATCH LIST** Hurricane Florence damage coupled with heavy rains over the winter months have driven down supply. Growers can't get into the fields to harvest/move product quickly enough to meet demand and therefore market pricing is up. We do not anticipate any change as most all regions and weather have magnified the short year's issues with availability. We anticipate pricing will only rise further come summertime.



**ONIONS EXTREME** White onions remain extreme as supply is very limited. While Idaho/Oregon and Washington continue to wind down, there still remains another 3-4 weeks of supply to ship out of this region. Growers are feeling pressure to move product before it sprouts or continues to break down. Because of this, we are seeing some weakness on all sizes of yellow onions. Texas is full steam ahead on their product and will likely ship strong until the second week of May. The Imperial Valley, California also started shipping this past week. To start, they are primarily shipping yellow onions, with volume on reds to start next week and whites starting the following week. Quality is strong and sizing is heavy to Jumbos and Colossals. We anticipate the market will remain fairly steady over these next few weeks as new growing regions will take the place of the decrease in supply in the Northwest. We will likely see a tiered market between old crop prices and new crop prices until the Northwest is fully out of the picture.



**POTATOES (IDAHO)** The Potato market remains stable, with good availability on all Cartons and Consumers. There will be some Norkotah availability for another month before we see only Burbanks. The Burbanks remain a smaller profile, with limited availability on large cartons. There have been no transportation issues during this time.



## **TOMATOES**

### **TOMATOES - EAST**

---

- **Rounds:** Round tomatoes continue to drop in price. Production out of Florida continues to be strong, and weather has been very favorable. We could see a sizing inversion in the upcoming weeks.
- **Romas:** Roma prices are flat for the week. Production is meeting the current demand. Quality for the most part is good.
- **Grapes:** Florida is seeing steady-to-up pricing for the week. There are some quality issues out of Mexico, which is causing vendors to pull from Florida—thus the increased price.
- **Cherries:** Cherry tomatoes are flat for the week. Supply is meeting the current demand. Quality is good.
- **Organic Tomatoes:** Supply is improving, and markets are easing. Overall quality is good.

### **TOMATOES - WEST AND MEXICO**

---

- **Rounds:** Round tomatoes continue to drop in price. Mexico is starting to slow down, but the Baja and other California regions will start to ramp up. The only quality issue right now is soft fruit out of Mexico.
- **Romas:** Roma prices are flat for the week. Production is meeting the current demand. Baja production is expected to start up soon. Quality for the most part is good.
- **Grapes:** Mexico is showing steady-to-down pricing for the week. There are some quality issues out of Mexico.
- **Cherries:** Cherry tomatoes are flat for the week. Supply is meeting the current demand. Mexico continues to see quality issues.

**APPLES, PEARS, TREE FRUIT, AND STONE FRUIT**

---

# WEEKLY MARKET REVIEW



## APPLES

- **GRANNY SMITH** - The Granny Smith holdings in Washington are low as compared to last year's crop. We will have some supply of Grannys through the balance of the season. The best values will be on Exfcy # 1 72s to 88s although the pricing on the crop will continue to increase throughout the balance of the marketing season.
- **FUJIS** - Fujis are peaking on 64s to 88s with most grower lots heavy to Exfcy # 1 grade.
- **GALAS** - The quality of the Gala apples is very good. Most grower lots are peaking on Premium Exfcy 80s to 113s.
- **HONEYCRISP** - We will pack Honeycrisp through about the middle of June. The overall pricing on Honeycrisp this season is much less than the past several years due to increased production. Prices will increase over the next couple of months.
- **CRIPPS PINK** - We will have Cripps Pink apples through the summer months. Most grower lots are peaking on Premium Exfcy 88s to 113s. The pricing is fairly high at this time and should remain fairly steady through the spring months.
- **BRAEBURNS** - We will have Braeburn apples through June. Most grower lots are peaking on Premium Exfcy 80s to 100s.
- **CRIMSON DELIGHT** - The Crimson Delight is a sweet tart apple with good blush red color. They are very crisp and keep very well. We will have plenty of supply through about the 1st of June.



**PEARS** The Anjou, Bosc, and red pears are available, and we will have good supply of US#1 pears available through about the 1st of June. The pear market has been lower this season due to additional supply, so pears are a great value at this time.

## STONE FRUIT

- **Apricots** domestic apricots are available.
- **Cherries** domestic cherries are available.
- **Nectarines** are available.
- **Peaches** are available.



## 2019 PRODUCE ALLIANCE NATIONAL CONFERENCE

AUSTIN, TEXAS - MARCH 18-21, 2019

**Driscoll's**  
Only the Finest Berries™



**Bolthouse FARMs**



**Wonderful citrus.**

**Atlanta**  
5400 Laurel Springs Pkwy Suite  
1002  
Suwanee, GA 30024  
Phone: 678.947.3000



**Nashville**  
One Vantage Way Suite  
B-440  
Nashville, TN 37228  
Phone: 615.259.0290

# WEEKLY MARKET REVIEW

## **Buffalo Grove**

100 Lexington Drive Suite  
201  
Buffalo Grove, IL 60089  
Phone: 847.808.3030

## **Chicago**

230 W. Huron Street Suite 200  
Chicago, IL 60654  
Phone: 312.573.7610

## **Salinas**

60 West Market Suite  
130  
Salinas, CA 93901  
Phone: 831.455.7800