

WEEKLY MARKET REVIEW

LAKE PARK:

Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17
90° 73° F	86° 72° F	92° 72° F	91° 72° F	93° 72° F	95° 73° F	95° 74° F
 PM Thunderstorms	 Thunderstorms	 Cloudy	 Isolated Thunderstorms	 Isolated Thunderstorms	 Partly Cloudy	 Partly Cloudy

SALINAS:

Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17
73° 56° F	70° 55° F	74° 56° F	76° 57° F	73° 57° F	70° 57° F	70° 58° F
 Sunny	 Partly Cloudy	 Partly Cloudy	 Sunny	 Sunny	 Partly Cloudy	 Partly Cloudy

JALISCO, MX:

Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17
87° 67° F	83° 65° F	82° 66° F	80° 67° F	80° 66° F	80° 65° F	85° 66° F
 Thunderstorms	 Thunderstorms	 PM Thunderstorms	 Scattered Thunderstorms	 Thunderstorms	 Scattered Thunderstorms	 PM Thunderstorms

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
Plums	Market seems to be a tad lower as more inventory becomes available.	Plums are the perfect summer snack, that will provide you with the minerals and vitamins your body needs, and few calories as well! Fun fact: Plums can actually reduce the appearance of scars on the body, AND they are great for your skin and bones. Everybody could use some plum in their life!

FRUITS & VEGETABLES



AVOCADOS ESCALATED – We expect the market to soften as the Loca crop ramps up out of Mexico; this will balance the decline in the Peruvian and California crops. Current projections call for a peak in 60s and smaller. Peru has hit its peak and will see a sharp decline over the next several weeks. We do anticipate this market to turn back around in August and September when we see the Aventajada crop begin.



BANANAS Conditions are relatively stable with inbound supply as we enter the summer months. Volumes are declining slightly from all importers, but this is normal for the time of year. Fruit quality is very good.



PINEAPPLES We are hitting some supply gaps as we are into the summer months, which is normal for this time of year. Supply will remain tight through July and will skew to the smaller size profile during this time frame.



GRAPES Grape sizing is Large/XL on both Red and Green grapes. Del Monte is shipping US Domestic grapes currently.

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KIWIS Good Supply available on Chilean product.



BLUEBERRIES EXTREME Blueberries are in a harvest gap with the Pacific NW being weeks behind schedule. Blueberries will be our toughest item for June. Prices will remain high and product is still very short in supply.



BLACKBERRIES EXTREME Due to the previous rain and high temperatures, we are seeing a significant drop in yields in our blackberry production in Northern CA. We expect to see a shortage in supply and rising prices.



RASPBERRIES EXTREME Raspberries will be the least affected as they are grown under hoops and at elevations where they have not been heavily impacted by heat.



STRAWBERRIES EXTREME We are still experiencing severe shortages and higher prices due to the past rain followed by extreme heat in the berry growing region.

CALIFORNIA-ARIZONA CITRUS



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

Imports/Specialties available:

- Blood Oranges
- Gold Nugget
- Ojai Pixie
- Sunkist Delite



LEMONS EXTREME We continue to have tighter supply and higher prices on smaller sizes (165s/200/235s). This is also impacting the 140s as customers move up in size. We still have more 115s and larger, but we are going to get tight on those sizes. Prices are rising.



LIMES (PERSIAN) : The market is steady to slightly higher compared to last week. Rain in Mexico reduced the volume of shipments into South Texas. Quality is good with occasional issues of scarring and yellowing.



NAVELS/ VALENCIAS Navels will be winding down this week. The season will end sooner than expected. Valencias are available.

WEST COAST LETTUCE



GREEN & RED LEAF

ESCALATED The market is up this week. Supply is tight due to quality issues caused by the previous poor weather.



BUTTER

ESCALATED The market is up this week. Supply is tight due to quality issues caused by the previous poor weather.



ICEBERG LETTUCE

ESCALATED There is still light supply due to the previous hot weather. The market has been very active. Quality is fair.



ROMAINE

ESCALATED We have shortages in supply and higher prices. Quality is fair with some cupping, fringe burn, twist, and internal burn.



ROMAINE HEARTS

ESCALATED We have shortages in supply and higher prices. Quality is fair with some cupping, fringe burn, twist, and internal burn.

EASTERN & WESTERN VEGETABLES



PEPPERS

Green Bell Pepper: Green bell peppers are down slightly in the West due to increased supply. Quality is good. Western supply is improving, and pricing is coming down a bit from last week. Quality is good.

Red Bell Pepper: WATCH LIST We are seeing more fruit become available as transition to Arvin is well underway; Coachella is still going but seeing some quality issues. We should wrap up the desert this week. Markets should improve late next week.

Yellow Pepper: The yellow pepper market is tighter this week due to the heat out West earlier in the month. We will see active markets on all color peppers through July.

Mini Sweet Pepper: Nogales is winding down quickly and there are lots of condition issues upon arrival. Baja is still 2-3 weeks away from any volume. Canadian and domestic crops have much nicer quality and are expected to have steady to moderate volumes for the immediate future.

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Mixed Chili Pepper: Baja's chili pepper volume has been steady, providing all varieties on a consistent basis. Domestic supply has also started in CA, where they expect to see more volume over the next few weeks. Quality is mostly good, but poblanos and Anaheims are pretty rough until new fields start. In the East, there are a few chilies left in GA, but most production has scattered to small local deals where growers pick and choose the varieties they plant.



EGGPLANT GA still has eggplant to offer but quality is hit or miss, sending buyers to other states with new crops. Eastern NC has a significant crop with strong volume that's just getting into the swing of things, and several other local areas are beginning to show up with fruit. The West has fully transitioned to CA's Central Valley where volume is ramping up.



CUCUMBERS Cucumber supply is tight in the West and prices are up this week. Eastern supply is coming from Georgia, and supply is steady. Quality is fair to good.



ENGLISH CUCUMBERS There is a steady supply available from Georgia, Texas, and Canada. Markets are stable.



GREEN BEANS Both Eastern and Western markets have plenty of green beans available to meet demand. After a recent shortage in the East, there are at least five states coming in with product now. Western volume is concentrated in CA, although there are also beans in WA and more to come from Baja.



ZUCCHINI AND YELLOW SQUASH **Zucchini / Yellow Squash: WATCHLIST (Baby Squash):** Yellow squash is steady to up for the week. Georgia is reporting a slight price jump due to an increase in demand. Quality continues to be a struggle, with good quality driving some higher prices. Wind scarring continues to be a challenge. Zucchini is steady to up for the week. Mexico looks to be flat, while the East is seeing a slight price increase due to an uptick in demand. Quality is good for the most part.



MELONS

Cantaloupe: California production continues to increase each day as more growers get started. Overall volume has been slow to start due to issues during the planting period and cooler-than-normal weather the past few weeks. The cooler weather is causing the fields to produce mostly mid-to-small sizes (12/15s), leaving 9s and larger in a limited position. We anticipate a shift to larger fruit as new fields start breaking over the next 7-10 days. Quality has been exceptional on the new valley fruit with brix levels running mostly 12-16%.

Honeydew: Honeydew production remains mostly limited in the newer growing regions as fields have not sized up due to the cooler weather. Daily harvests have shown a high percentage of 8s, causing poor yields which have left larger fruit very limited. We do expect this situation to ease as more production starts to hit the market over the next week. The honeydews have also been experiencing consistently higher brix levels with the range being 11-14%.

Watermelon: Good supply crossing through Nogales and McAllen. New crop is also available out of the desert and South Georgia. Quality is outstanding and promotions are available.



HERBS

LEMON GRASS The cost has almost doubled, and we will be going up the week of July 15th. This price should stay firm for most of the summer.

All other herbs are steady in supply.

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/ MEXICO
Bay Leaves	Steady	Good	COLOMBIA
Chervil	Tight	Good	USA
Chives	Great	Good	MEXICO
Cilantro	Steady	Good	USA
Dill	Fair	Good	USA
Epazote	Steady	Good	MEXICO
Lemongrass	Steady	Good	USA
Marjoram	Steady	Flowering	USA
Mint	Great	Good	USA
Oregano	Steady	Flowering	USA
Italian Parsley	Steady	Good	USA
Rosemary	Steady	Good	USA/ MEXICO
Sage	Steady	Good	USA/MEXICO

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Savory	Steady	Good	USA
Sorrel	Steady	Good	USA
Tarragon	Steady	Good	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 have improved and product is available.



ASPARAGUS ESCALATED Quality is good on large, standard, and small. Some light feathering on Jumbo and XL but overall good quality. We are seeing prices rise due to flight issues out of Peru and shortages in our Mexican crop.



BOK CHOY 50# are in short supply and prices are steady.



BROCCOLI / BROCCOLI FLORETS Supply is lighter this week. Quality is good.



BRUSSEL SPROUTS Supply is plentiful and quality is good.



CABBAGE (GREEN) Supply and quality are good.



CABBAGE (RED) ESCALATED Supply continues to be light.



CARROTS Supply and quality is good. Supply is now available in Georgia.



CAULIFLOWER: Supply is expected to be good, but will lighten up as we head into the weekend. Volume could be down significantly next week.



CELERY: The market has finally stabilized. Plenty of supply available.



CORN Markets are down, with good supply available on yellow, white, and bi-color out of Florida and the desert. Promotions available.



CILANTRO Supply is tight this week.



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 due to trade tariffs being imposed on products from China.



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



GREEN ONIONS Supply, quality, and demand are good.

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JICAMA Storage product available--will see blemishing due to the fact it's storage fruit. Good supply available.



KALE (GREEN) Supply and quality are good. Demand is fair.



MACHE Availability is adequate.



MUSHROOMS Supply is currently stable, and quality is good.



NAPA Supply, quality, and demand are fair.



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



PARSLEY (CURLY, ITALIAN) **ESCALATED** Supply is fair due to recent weather-related issues.



RADISHES Markets are firming up due to heavy precipitation and wind damage to fields.



SUGAR SNAP PEAS & SNOW PEAS
Quality is good, supply is abundant.



BABY SPINACH Supply and quality have improved and product is available.



BUNCHED SPINACH Supply and quality have improved and product is available.



SPRING MIX Supply and quality have improved and product is available.



SWEET POTATOES AND YAMS **WATCH LIST** The sweet potato market continues to be tight after many growers were affected by Hurricane Florence in North Carolina last September. Increasing demand and heavy rains in Mississippi, Louisiana, Arkansas, and Alabama also created challenges for the other major growing regions, but luckily quality and size is still good. We will continue to see the price of sweet potatoes rise month by month over the summer until we get to next season's harvest.



ONIONS

ESCALATED The onion market has stabilized because supply and demand have balanced. All regions are into supply again, but there is not an abundance of supply anywhere. The concern remains that the cooler temperatures and rain that California experienced a few weeks ago are going to lead to higher levels of shrink and a stronger market for the tail-end of their shipping season. It is the expectation that the market will stay pretty firm throughout the summer due to planting delays as well as cooler weather and storms. Typically, the Northwest begins shipping around the first or second week of August and has an overlap with what remains in New Mexico and California; however, due to 2-4 week planting delays, we expect them to be later than normal this year.



POTATOES All growers are running Burbanks exclusively through the end of the storage season in August; at that point, there will be Norkotahs out of the field. There has been little size in the Burbank crop and the Carton market is reflecting that. We are seeing strength in recent weeks with very good demand. Transportation has been challenging with increased rates.



TOMATOES

TOMATOES - EAST

- **Rounds:** Eastern rounds are unchanged from last week; lighter supply. Demand remains moderate due to customers still pulling Vine-ripes from the west. We should see local Tennessee and Virginia tomatoes ramp up this week.
- **Romas:** Roma prices are up and volume remains snug out of Tennessee. We should see this improve next week as volume on new crop continues to ramp up.
- **Grapes:** Grape tomatoes prices remain firm as volume is still sluggish out of Virginia. We should see this turn late next week.

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- **Cherries:** Cherry tomatoes are steady in the East. Current supply out of Florida is meeting current demand. Quality is good.
- **Organic Tomatoes:** Seeing a mixed market as we transition from Jasper to the Carolinas and Virginia. FOB prices will be up this week and quality will vary due to the transition.

TOMATOES - WEST AND MEXICO

- **Rounds:** California supply has started for the season. Markets and supply are steady out of Mexico, with good supply and demand stronger out of the East due to lighter supply from Tennessee and the Carolinas.
- **Romas:** Roma prices are up from last week, with adequate supply and moderate demand. Quality out of California and Baja is fair.
- **Grapes:** Grape tomato volume is extremely light as we transition production regions and blocks. Quality is fair; expect stronger markets for the next 7 to 10 days.
- **Cherries:** Cherry tomatoes are in tight supply in the West. Current supply out of Mexico is meeting current demand. Quality is good.

APPLES, PEARS, TREE FRUIT, AND STONE FRUIT



APPLES

- **RED DELICIOUS:** We will have good supply of Red Delicious apples through the rest of the season. Most grower lots are peaking on 72s to 100s. The best values and promotional items will be Premium and Exfcy # 1 Red 80s to 113s. The condition and quality are fair. Starting to see more watercore and lower shelf life on processed products. We do expect to see this be more prominent in all of the red varieties through the end of the storage season.
- **GOLDEN DELICIOUS:** Golden delicious supply in Washington is very tight and will continue to be tight through the balance of the season. There will be little supply through the end of the season, with some growers finishing up in early August.
- **GRANNY SMITH:** 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 Grannys will continue to increase throughout the balance of the marketing season.
- **FUJIS:** The Fujis remain steady and are peaking on 64s to 88s with most grower lots heavy to Exfcy # 1 grade. Expect some shippers to finish up within the next few weeks, leaving a short supply to the end.
- **GALAS:** The quality of the Gala apples is very good. Most grower lots are peaking on Premium Exfcy 80s to 113s. Again, some shippers will be finishing in a few weeks while others will have product until new crop begins.
- **HONEYCRISP:** Demand and movement have been excellent. Prices have increased considerably over the past several weeks with overall pricing between \$5 to \$70 per carton on Premiums. Several shippers are finishing up this month.
- **CRIPPS PINK:** There will be pinks available through the summer months; however, some shippers will be finishing in the next few weeks. Most grower lots are peaking on Premium Exfcy 88s to 113s.



PEARS Pears: The Anjou, bosc, and red pears are all winding down. Supply mainly consists of 100s and larger, US#1, and very few fancy. Quality remains good.

STONE FRUIT

- **Apricots:** Steady supply available out of California and ramping up out of the Pacific Northwest.
- **Cherries:** Excellent supply on Bings out of Yakima and markets are falling. Quality is outstanding. Rainiers now available as well.
- **Nectarines:** Domestic nectarines are available.
- **Peaches:** Domestic peaches are available out of California, South Carolina, and Central Georgia. Light volume is being reported out of New Jersey.
- **Plums:** Market seems to be a tad lower today as more inventory becomes available.

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