

MARKET OUTLOOK



Apples



SUPPLY
FAIR
QUALITY
GOOD

Apples are currently coming out of WA State. Red Delicious volume is down from last year and projected to be out by mid-Sept. The transition from CA Reds to New Crop is on target so gap is not expected. Golden Delicious are about the same as last season and expecting to be out the first week of Aug. New crop starts around Aug. 10th. During the Summer, it usually slows down so transitioning into New Crop should be perfect. Gala volume are less this same time last season and expected to be out the first of August. New Crop is expected to start around Aug. 8th. Fuji volume are down from last year and expected to be done mid-August. There could be a gap as New Crop are expected to start mid-Sept. Granny Smith should transition into New Crop without any issues. Pinks is another variety where WA is in a good position. With movement slower through the summer, CA crop will go through Sept. New Crop will start mid-to-end of Oct. so good possibility of a two-week gap.

Asparagus



SUPPLY
GOOD
QUALITY
GOOD

Asparagus from Guanajuato continues to increase due to the cooler weather. Mostly standard and large. Peruvian production continues to slow down due to the cold weather. Jumbos continue to be short and price is elevated. West coast market is elevated while the east coast market is down slightly.

MARKET ALERT

Avocados



SUPPLY
FAIR
QUALITY
GOOD

A 10% reduction in total volumes for the US is enough to firm up this market and stop the pricing decline. All country of origins totaled 56.5 Mil lbs. last week. This number could have been higher, but some port delays for Peru combined with rain limiting some Mexican harvest stopped the volume swell. Mexico's rainy season is now through September, and historically July is the wettest month, bringing more rain delays to harvest plans. The Loca crop is in full swing, and estimates continue to show the 2022/23 season to be much larger in volume. With the influx of volumes and price points down, it's a good time to get back into promotions: large sizes from Peru and 48s and smaller from Mexico. After pricing settles after this initial wave of volume we're anticipating some stability to come back to our category. Standing inventories in the US are up to 55 Mil lbs., relatively close to last week's 51 Mil lbs. Expectations are for more modest adjustments both up & down over the next few weeks as the industry adapts to lower pricing points and promotions start to come back online. Reminder, the Loca fruit will handle differently as the dry matter resets with every new bloom, and it will take longer to ripen and have a longer shelf-life.

Bananas



SUPPLY
GOOD
QUALITY
GOOD

While the situation in GTM has been a difficult one to manage through, we are starting to see improvement in the fields and with the logistical challenges that presented themselves in GTM. The current "tight" market will remain for the rest of this week. We are anticipating more favorable volumes, which is good news.

Berries



SUPPLY
GOOD
QUALITY
GOOD

Blackberries: Prices for Blackberries are trending up this week. The market is seeing tighter supplies. Rain and hot weather in the East is hampering volumes. Production out of California is winding down and moving to the Northwest. Growers are for lower prices in the weeks to come. Supply and Quality are FAIR.

Blueberries ALERT: Prices for Blueberries are trending down this week but are still elevated. Production out of the Pacific Northwest is starting after a late start. Growers are expecting good volumes once they fully get running. Rain has hampered production out of the East.

Raspberries: Prices for Raspberries are stable this week. Supplies are coming out of Mexico, Georgia, and California. Growers are expecting pricing to come off a bit in the weeks to come.

MARKET OUTLOOK



Beans



SUPPLY

FAIR

QUALITY

FAIR

Green Beans: Green beans are transitioning north up to Tennessee and Michigan, but supply has been good. West coast supply and quality remains stable.

Snow Peas: Domestic supplies and quality continues to be good. Central America continues to struggle as the rain has slowed down production. Quality is showing to be good.

MARKET ALERT

Broccoli



SUPPLY

FAIR

QUALITY

FAIR

Supplies continue to be light for this week. Fair quality has only been reported at this time. Occasional brown bead and occasional hollow core. Expect market pricing to improve next week. (F.O.B pricing for this week \$18.50 - \$19.50)

MARKET ALERT

Brussels Sprouts



SUPPLY

IMPROVED

QUALITY

FAIR

Supplies are much better this week. Quality has also improved. Strong demand continues Brussel Sprouts. Market pricing has decreased from previous weeks. (F.O.B pricing for this week \$24.95 - \$26.00)

MARKET ALERT

Cabbages



SUPPLY

FAIR

QUALITY

FAIR

Supplies continue to be very limited for this week. Growers are reporting very low yields at field level. Supplies are expected to improve the next few weeks. Expect markets to remain escalated going into next week. (F.O.B pricing for this week \$22.00 - \$22.60)

MARKET ALERT

Carrots



SUPPLY

POOR

QUALITY

GOOD

Crop sizing still small, so jumbos are extremely limited. We encourage all to be open to use table carrots instead. Due to some precuts are taken from jumbo, there has been low supply on carrots sticks and other pre-cuts as well.

Cantaloupes



SUPPLY

GOOD

QUALITY

GOOD

Cantaloupe production continues at a slow pace. The overall deal for this region was later than normal but early fields are smaller in size which has kept daily inventory very minimal. Sizing has also been an issue as initial seed varieties are providing almost exclusively 9/9Js leaving 12/15s very limited. Quality has been outstanding with strong netting, good color, and solid internal characteristics. Brix levels are mostly 14-16% with some even showing higher.

MARKET OUTLOOK

Cauliflower



SUPPLY

GOOD

QUALITY

GOOD

Supplies continue to be very good this week. Good quality continues to be reported. Current supplies are coming from Santa Maria, and Salinas CA. Demand for Cauliflower is down. Expect markets to remain steady going into next week. (F.O.B pricing for this week \$12.00 - \$13.00)

Celery



SUPPLY

GOOD

QUALITY

GOOD

Supplies are steady going into next week. Good quality has been reported at this time. Market pricing continues to improve. Supplies are currently coming from Salinas CA and Santa Maria CA. (F.O.B pricing for this week \$13.08 - \$15.35)

Citrus



SUPPLY

FAIR

QUALITY

FAIR

Limes: Demand has been moderate. Overall quality is deteriorating, as shelf life and color declines. This is typical of seasonality trends caused by extreme high temperatures and humidity. Small fruit still represents majority of yields, while large sizes continue to be low. Peak size on 230s/200s/175s. The price on all sizes has just about bottomed out given current yields per size.

Lemons: Lemons have started to tighten up. Central Valley is finished for the season. Coastal region has had very little Fancy fruit, very heavy on choice and standards but some rough fruit this season. Fruit is very yellow, soft and has heavy scars; this is normal for this region. Right now, is the only real lemon option for food service. Argentina has started to arrive but only to the East and all 140s and larger Fancy. Chile will arrive and MX will start around mid-July. Due to the quality this season, Coast Region is trying to be done by end of August, they usually go until end of September. Market will be tight until Chilean and MX get started. With all the imports coming in and Coast Region pushing to be done early it may create a congestion in the market and cause the market to tumble. We will be watching this close both Chile and Argentina are hopeful for a good market.

Oranges: CA Valencia is in full swing and expected to last until end of September. Peak sizing on smaller fruit. Quality is excellent. Valencia crop is slightly down from last year. Market will stay strong. The fruit is the smallest it's been in years to start. Many shippers are planning to stop harvesting until August when school starts back up. Most years in mid-August when school start back up, demand has exceeded supply. Some shippers are thinking the market on small Valencia will be \$28-30 in August, so they want to keep fruit for this time frame.

MARKET ALERT

Corn



SUPPLY

FAIR

QUALITY

GOOD

Prices for Corn are trending up this week. California is expecting tight supplies for the next few weeks. Production out of the East has been impacted by heat. Georgia will be winding down and production is working its way to the North East regions. Growers aren't taking on any new business. Expect the possibility of order cuts.

Cucumbers



SUPPLY

FAIR

QUALITY

GOOD

Prices for Slicing Cucumbers are trending down this week. Production is coming out of New Jersey, Michigan, New York. Baja and Central Mexico are covering the West. Prices are expected to remain at a good value in the weeks to come.

MARKET OUTLOOK

MARKET ALERT

Eggplant



SUPPLY
FAIR
QUALITY
GOOD

Prices for Eggplant are trending up this week. Supplies are tight out of the East and West. Growers are expecting elevated prices for the few weeks.

Grapes



SUPPLY
GOOD
QUALITY
FAIR

The 2022 California table grape season is off to a solid start with similar volumes to 2021 expected. Harvest is about normal, having started in week 18 in the Coachella valley and in week 26 in the San Joaquin Valley. The general expectation on final prices are vague due to packing cost materials and inflation.

MARKET ALERT

Herbs



SUPPLY
GOOD
QUALITY
FAIR

Cilantro: Supplies are light this week. Fair quality is only reported at this time. Most growers will be shipping out of Salinas CA and Santa Maria CA. (\$19.48- \$20.00)

Honeydews



SUPPLY
SHORT
QUALITY
GOOD

Honeydew production in the San Joaquin Valley was also late to start but is starting to pick up momentum this week. As with the cantaloupe, larger sizing is being contended with as we see primarily 5/5Js and very few 6s or smaller so far. Quality on the dewes has been very good with melons being clean externally with limited scarring but brix levels are showing in the 13-15% range. The entire growing region saw an uptick in temperatures the past couple days (105-110) which has caused afternoon harvesting to be curtailed out of concern for the packing crews. This has contributed to lighter numbers being packed daily as well.

MARKET ALERT

Leaf



SUPPLY
GOOD
QUALITY
GOOD

Romaine (ALERT - Romaine Hearts): Supplies will continue to be light for Romaine Hearts. Overall quality is having the biggest impact on yields. We are expecting supplies to continue to struggle going into next week. Due to the warmer weather quality will only be fair, and average weights are to be expected for next week. Romaine Lettuce is also having quality issues due to the warmer weather. (Romaine pricing for this week \$10.40 - \$11.58) (Romaine Hearts pricing for this week \$18.60 - \$20.63)

Green & Red Leaf Lettuce: Supplies continue to be steady going into next week. Quality continues to be good, with some occasional wind and fringe burn. Warmer weather has added some additional challenges to leaf items. (F.O.B pricing for this week \$10.25 - \$10.75)

Tender Leaf: Supplies continue to be steady going into next week. Demand continues to be good, quality has also been reported as good. Supplies will remain steady for a few weeks. Warm weather is causing some challenges to the tender leaf growers. (F.O.B pricing for this week \$4.65 - \$4.75)

MARKET OUTLOOK



Iceberg



SUPPLY
GOOD
QUALITY
GOOD

Supplies continue to improve this week. Overall quality has been reported as only fair at this time. Weights will be on the lighter side for next week. Expect market pricing to remain steady the next few weeks. Warm weather is affecting yields and quality at field level. (F.O.B pricing for this week \$14.73 - \$15.73)

MARKET ALERT

Mushrooms



SUPPLY
SHORT
QUALITY
FAIR

Shitake Mushrooms: Due to uncontrollable rise in cost of imported Shitake logs from China. Shitake mushrooms supplies will be short, prices will be changing almost weekly. Long delays to unload shipments at the ports have caused some interruptions with supplies. This is caused by labor shortage and limited freight availability.

The mushroom industry continues with a shortage of labor, as well as cost inflation increases in raw materials. Specifically corrugated cardboard and packaging materials. Additionally, the price increases in freights nationally have greatly impacted cost to mushroom growers. Pricing on mushrooms must increase at this time due to Labor, Transportation, and packaging.

Onions



SUPPLY
GOOD
QUALITY
GOOD

Onions are coming out of California, New Mexico, and Washington. Quality has been good overall. Supplies out of New Mexico continues to be light due to the rain they have been receiving. Not a lot of open market product available. Market is trending upward, and demand is good. This is affecting pre-cut as well. Freight and fuel rate continues to escalate.

Onions Green



SUPPLY
GOOD
QUALITY
GOOD

Supplies are better this week. Market pricing is steady this week. Green onions are currently coming from Mexico. Growers down South are having some labor shortages. (F.O.B pricing for this week \$10.00 - \$10.50)

Peppers Bell



SUPPLY
FAIR
QUALITY
FAIR

ALERT - Red & Yellow Bells: Prices for Green, Yellow and Red peppers are trending up this week. Supplies remain tight. Rain in the East has impacted supplies. Production out of the West is moderate as growing area transition from South California to the North. Growers are expecting the market to remain elevated for the next few weeks or longer.

Peppers Chili



SUPPLY
FAIR
QUALITY
FAIR

Prices for Chili Peppers are mostly stable this week. Georgia is fighting heat and associated quality issues. Production is moving North. California is seeing light volumes.

MARKET OUTLOOK

Pineapples



SUPPLY

FAIR

QUALITY

GOOD

Pineapple availability is tight due to the natural and normal crop cycles. Quality is reported as good. 5s and 6s are the tightest with some availability on the small size. Demand is good, and market is high.

MARKET ALERT

Potatoes



SUPPLY

LIMITED

QUALITY

FAIR

EXTREME ALERT: The potato market continues to be extremely tight on all size and grades. Old crop storage supplies are very low, and some are already out. Some suppliers are expecting a 4-week gap. Quality is still a concern with hollow hearts and pressure bruising from storage. Expect orders to be short as there are no open market product available. Need to be flexible with sizing, state of origin, and open to alternative such as sweet potatoes, reds or yellow during the shortage. Marketing is hitting \$30 FOB. This is affecting precut potatoes as well. Demands exceed supplies. New crop Norkotahs are expected to begin in August, but it will take at least 10-14 days to refill the pipeline.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Green and Zucchini Squash are trending down this week. Production for the Eastern states is coming from all over the Northeast. The West is being covered by Baja and Santa Maria. Zucchini is the best value right now. Yellow Squash is priced a bit higher but is still a value too.

Strawberries



SUPPLY

GOOD

QUALITY

GOOD

Prices for Strawberries trending up this week. Look for prices to work higher in late July as volumes come down in California. Supplies continue to tighten up. Grocery Chain Stores are running promotions on strawberries and that's keeping the market on the tighter side. Look for that trend to remain the same in the weeks to come.

Tomatoes



SUPPLY

FAIR

QUALITY

FAIR

ALERT - Roma: Prices for 20 lb Round Tomatoes are trending down this week. 25 lb Round tomatoes and Roma are stable. Production for the East is coming out of Quincy, Tennessee, North Carolina, and Virginia. California and Eastern Mexico are covering the West. Roma's are tight due to a gap in the East. Growers are looking for tight supplies on Roma's for another week or two.

Watermelons



SUPPLY

GOOD

QUALITY

GOOD

Supplies on Seedless remain good while minis continue to be tight. North Carolina and Missouri have light supplies. Yuma and Phoenix are winding down. Southern California is starting. Quality has been very good. Supplies are expecting to get better in August.

