



WEATHER UPDATE

Salinas— Sunny to partly cloudy next week. Highs in the 70s and lows in the mid-50s. **Oxnard**— Sunny to partly cloudy next week. Highs in the 70s and lows in the lower 60s. **Mexico (Culiacan)**— Cloudy next week with chances of thunderstorms starting Monday through the rest of the week. Highs in the upper 90s and lows in the mid-70s. **Florida, Southern**— Cloudy with chances of scattered thunderstorms throughout the entire week. Highs in the lower 90s and lows in the mid-70s. **Idaho**— Sunny to partly cloudy next week. Highs in the lower 90s and lows in the 50s.

TRANSPORTATION

The National Diesel Average has been recorded at \$3.044 down \$0.007 a gal from last week and down \$0.179 gal from last year. NPC continues to monitor and track diesel fuel averages by state as well as reported truckload freight rates on a weekly basis. **Transportation continues to work through its most significant structural changes in years in regards to new laws and regulations stressing available truck volume and controlling drivers. Trucks are in good supply in most of the country, however there are shortages in Delaware, Maryland, Eastern Shore Virginia, SW Indiana, SE Illinois, & SE Missouri.**

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MARKET ALERT

ASPARAGUS
CILANTRO
CORN
ONIONS
PINEAPPLES
POTATOES
ROMAINE HEARTS
SWEET POTATOES

MARKET OUTLOOK



Apples



Washington had a shorter crop during the 2018 season than in 2017 – an estimated 117 million 40-pound boxes compared to 133 million boxes -- said Toni Lynn Adams, communications outreach coordinator for the Washington Apple Commission. “We can expect some increased volume and a solid crop moving into the new season,” she said in late June. Red delicious, gala, golden delicious, granny smith, Pink Lady, Honeycrisp and fuji are the top sellers for the data.



Asparagus



Markets are extremely high, especially in the west if you can find product. Florida is high as well, but not as high. JBO, XL are very tight which is affecting largely with the demand. Mexico production is very low, and the weather patterns are the main root of these issues. Look for this to remain strong & steady for another week or two.



Avocados



Markets are firm on 48's and larger and softer on 60's and smaller. The current loca crop's size profile is for 60's and smaller. This crop is also very clean and not many #2's are being produced. Peru is softer on all but 48's, they have had to adjust their markets in order to stay competitive with Mexico. California continues to pick low volumes, and for the most part can only cover western business.



Bananas



Supplies have slightly declined from importers, but it's normal for this time of year. Quality on fruit is reported as very good. Expect supplies to remain steady this week.



Berries



Blackberries yields are down due to the previous rain & high temps. But improving slightly over last week. California's expected to continue for another 1-2 weeks. Washington starting late-August/early-September.

Blueberries are tight with the Pacific NW being weeks behind schedule. Prices are expected remain high & product is still very short in supply. Georgia, North Carolina, Louisiana, & Alabama are all done or nearly done for the season. Oregon and British Columbia are still going with good volumes. Michigan is looking to start in about week.

Raspberries are light in production this week in Mexico and will be for the next few weeks as production moves to new districts.

MARKET OUTLOOK

Broccoli



Broccoli supplies continue to stay steady this week. Good yields are reported at the time of harvest. Good quality is being reported by multiple growers. Markets are expected to be steady going into next week. No shortages or pro-rates to report at this time.

Brussels Sprouts



Brussel sprout supplies are good this week. Yields at the time of harvest are above average. Markets expected to be steady going into next week. Good quality is being reported by multiple growers. No shortages or pro-rates are been reported at this time

Cauliflower



Cauliflower supplies are light this week. Yields are lower than expected, markets increased from \$12 to \$15 this week. Good quality is reported with growers. Expect steady markets for next week. No Shortages or pro-rates to report at this time.

Cantaloupes



Overall cantaloupe production has seen a decrease over the past week. Combined with a tremendous shift in sizing we are anticipating smaller fruit 12/15s to remain very limited. Good amounts of jumbo fruit are currently being harvested. Large amounts of rain & cooler weather interrupted planting schedules back in April & May. This will create some issues over the next few weeks as there will be gaps in normal daily production.

Carrots



Supplies are steady. Jumbo carrots seems to be short. This has pushed prices up a bit but Canada is starting so that may change. Quality is good right now and we don't expect to see any changes in the near future on that.

Celery



Celery supplies are very good this week. Good quality is being reported at this time. Expect markets to stay steady. Good quality is being reported by multiple growers. No shortages to report at this time.

Corn



MARKET ALERT



Supplies are still extremely limited this week. Illinois and Indiana are still struggling with quality. Northern regions like MI & NY are starting up in a week or so. Minnesota and Wisconsin will likely see a slightly later-than-normal start.

MARKET OUTLOOK



Cucumbers



Both Eastern and Western markets have plenty of cucumbers for sale this week! MI, NY, and NJ are all in strong production so there's plenty of fruit around and overall quality is good. Baja and WA are covering the West as both areas have seen upticks in production over the past week.

Eggplant



Eggplant supplies out of the East are light. NJ is coming into the peak of their season. Quality depends on area, only fair from the south and good from NJ. OH & MI are set to start the 1st week of August. Demand is low which is keeping pricing steady this past week and should remain steady through the weekend. Supplies out of the west are good with good quality. Available to load out of LA, currently harvesting out of Bakersfield & Fresno areas. Expect good supplies through the week.

Grapes



Flames will go for the next month with the Krissy variety starting in about 2-3 weeks as long as they get the color needed. Sugraones and Ivory are just getting started as growers have been waiting for brix so they can harvest. No quality issues have been reported.

Green Beans



MI and TN are the primary areas for Eastern green beans. Both areas have shipped light to moderate supplies and seem to be able to meet demand. In the West, several districts in CA and Eastern WA are churning out good volumes this week. We do expect CA harvests to cut back soon as hot weather hits the fields, but Baja will be into a new block by next week to help with supply.

Herbs



MARKET ALERT



ALERT on Cilantro: Supplies continue to be limited this week. This is mainly a supply issue. Very low yields are reported at the time of harvest. The markets are not escalated at this time. **Chervil** supplies remain tight as well. All other herbs are steady with good quality. Oregano & Marjoram have issues flowering but are still very usable.

Honeydews



Honeydew production remains low overall. As with the cantaloupe there was a shift in sizing to the larger fruit which has caused a shortage on the smaller fruit. We anticipate steady supplies over the next week so do not expect any change in the current market.



MARKET OUTLOOK

Iceberg



QUALITY  SUPPLY 

Iceberg lettuce supplies have improved this week. Prices are not escalated this week. Good quality has also been reported. No shortages and pro rates to report at this time.

Kale



QUALITY  SUPPLY 

No change in the kale market from last week, steady as it goes. Quality ranges from fair to good. Markets are expected to remain steady into next week.

Leaf



MARKET ALERT

QUALITY  SUPPLY 

ALERT: ROMAINE HEARTS – Volumes have improved this week. Unfortunately, reports of quality issues; fringe, wind burn, & light twist are present. Markets will continue to stay escalated this week but is adjusting slightly and is expected to improve into next week. Quality is also expected to improve.

Green Leaf & Romaine Lettuce – Volumes on these items are good this week. Good yields at the time of harvest, improved quality is also being reported. Expect markets to stay steady this week. **Red Leaf & Butter/Boston Leaf** volumes and demand are steady this week. However, there are some quality issues; some light fringe/wind burn on red leaf and irregular sizing.

Tender Leaf



QUALITY  SUPPLY 

Supplies of leaf lettuces are slightly better with quality reports showing improved sizing. Reports show some insect pressure with damage on the lower ribs as well as occasional wind-burned tips. Santa Maria and Salinas are the primary shipping points for leaf and Iceberg lettuces off the west coast.

Lemons & Limes



QUALITY  SUPPLY 

LEMONS – The market is steady this week with descent supplies due to import supplies starting up. Quality is good. Domestic supplies remain tight on smaller fruit and quality is average due to warmer weather.

LIMES – The market is on the rise this week on limes. Supplies have taken a turn due to wet weather & low pack outs in Mexico. Pricing has jumped from last week and will remain to rise, especially if importer continue to have issues replacing existing supplies.





MARKET OUTLOOK

MARKET ALERT

QUALITY



SUPPLY



Onions



The onion market remains high and tight – steady from previous weeks. Look for relief in the coming weeks as the NW starts to ramp up with new crop slowly. Idaho/Oregon look like they will start between the 8-15th of August, while NM and CA will start to wind down with supply around the 10th of August. Fears that the NW crop would be pushed 2-3 weeks behind because of the planting delays seems to have been offset by the higher temps in the growing regions over the last several weeks.

Onions, Green



Supplies on green onions continue to be steady this week. Demand is steady as well. No quality issues have been reported at this time.

QUALITY



SUPPLY



Oranges



The market remains steady this week with good supplies. No reports of any quality issues. Markets are around the mid-teens. Oranges are very promotable and competitive right now, with Valencia and navels rolling as well.

QUALITY



SUPPLY



Pears



Bosc - the State should be cleaned up in the next 2 weeks. Anjou Pears - Good supplies through July. Red Anjou Pears - We should be able to make it through June - it will be close.

QUALITY



SUPPLY



Peppers, Bell



Green - North & South Carolina are approaching the end of the season very quickly. SC is expected to be done this week. NC will be right around the corner. New Jersey has started but expect markets to remain strong as demand exceeds supply. Michigan is scheduled to start in a small way by the middle of next week. Heat in most of Central & Eastern parts of the USA will be a factor in respect to supplies during the upcoming weeks. **Red & Yellow** - Prices have dropped down just a bit, expect ample volume for the next 2-weeks. Quality being reported as very good.

QUALITY



SUPPLY



Peppers, Chili



Chili pepper production is in full swing in Baja & Santa Maria, CA and there's plenty of product available. Southern Mainland Mexico is producing as well, creating some deals here and there. Most of the Eastern chilies are coming out of NC this week, but there is some NJ product starting to show up. MI will also come onboard in a few weeks. Local deals in VA and KY are rolling along with light and moderate volumes, respectively.

Pineapples



Volume continues to be extremely limited and very limited sizes are available. No quality issues have been reported. Expect supplies to be limited for the next two weeks.

MARKET ALERT

QUALITY



SUPPLY



MARKET OUTLOOK

MARKET ALERT

QUALITY



SUPPLY



Potatoes



The potato market is spiking; fobs hitting \$19 on big spuds, \$11 on smaller and #2s are rising. We are at the end of the crop here is quality is of high concern. The market will remain high & tight trending upward until new crop comes on late next month and through September and October depending on the supplier's region.

Squash



QUALITY



SUPPLY



Squash is the same as last week, with it available locally in most every state that can grow it. However, quality & volume has been varied due to abnormal weather patterns including a heat wave, above normal July precipitation, and cold fronts. This is sending buyers to MI, where they've been the source for volume. Quality reports have been mixed out of MI with the worst concerns including sunken areas, decay & of course, scuffing/ scarring. Word is that MI's volume will likely drop off next week because of heat & bloom drop. With production increases in CA, WA and Baja, Western squash is plentiful this week.

Strawberries



QUALITY



SUPPLY



Volumes have increased this week on strawberries which is bringing the markets down. Quality is being reported as better this week. Growers are forecasting good supplies going forward this week.

Tomatoes



QUALITY



SUPPLY



Round Tomatoes: VA farms have been harvesting & providing consistent volumes. Quality has been holding up nicely. TN growers have been slow to come on this year & volume is still in the early stages. The NC mountain area has light but steady volume with nice quality. CA farms are easily handling much of the Western demand as all major growers are rolling with round crops. Volumes should remain strong for at least a few more weeks, but we could see yields affected by the recent heat wave. Since CA crops are generally not staked, they are susceptible to shape issues & scarring, which we're seeing on some lots now. **Roma Tomatoes:** TN farms started with romas a week or so earlier than rounds, so there is a little more volume available in the East. Other programs in NC & AL also have light volumes. We look for product in NJ & other more northern areas to come onboard in the next few weeks. Mexico's roma crossings are light as West Mexico & Baja start to wind down, leaving East Mexico as the primary supply area. Northern CA farms are now into good volumes. **Grape Tomatoes:** VA farms have been able to run steady on grapes. Overall, there's less volume around but there are some local deals in AL & NC to help meet demand. Quality is just fair. Western markets have a little product in both CA & Mexico but are also feeling the squeeze on supply.

Watermelons



QUALITY



SUPPLY



The market is slightly higher this week. For the second week in a row, and third of past four, movement came in lower than the past five years for the same respective weeks. Supplies are light on seedless & minis. With that lighter supply has come a solid price increase on seedless FOBs that seems to be helping lift up each of the various, and there are many, regions shipping at this time. This past week saw overall volume down roughly 6%, but a large part of that was due to the sluggish start for the Indiana crop. Rain this past weekend in Missouri and Indiana has slowed down production. North Carolina, Indiana and Delaware are going with limited production. Washington will start the first week in August.



MARKET OUTLOOK

MARKET ALERT

SWEET POTATOES – EXTREME ALERT Most suppliers are beginning to completely gap on sweet potatoes. Demand exceeds situation, we recommend being flexible on sizing and finding appropriate substitutions to get through this until new crop comes on late next month. New crop should begin harvest around the end of August to first of September. **Prices are extremely high and not coming down.**

Mexican limes lean on good quality supplies

Supplies of imported limes from Mexico are looking slimmer right now.

“The overall supply of limes has tightened after hitting record-breaking crossings in mid-June. And it’s especially tight for bright green color fruit, which many North American consumers perceive as quality,” says Nico Giraldo, Category Director for Limes for Wonderful Citrus based in Delano, Ca. Giraldo adds that crossings of limes into the U.S. are currently about 15 percent lower than the weekly average for this time of the year. “It’s not necessarily because harvested volumes are lower, but because fresh utilization is lower,” says Giraldo. “The supplies are coming from all producing areas of Mexico that are active right now but they’re all struggling to produce good quality green fruit.”

He notes that May was an extremely dry month in most growing areas and that the fruit that was developing at that moment under drought stress is what is currently being harvested. “So, this fruit is more ripe than normal for this time of the year which means yellower in color and with thin skin, making it very susceptible to defects,” he says. “Some growing areas are showing good green fruit but it’s still too small to harvest.”

Pricing pushing back up?

Demand for the fruit is coming mainly from the U.S. but Europe is also still pushing for fruit. The juice markets are also playing a very active role in price setting for raw fruit at the source, adds Giraldo. Because of those excessive crossings that happened in the middle of June, prices in the U.S. were significantly lower than the previous year. “But they have started to catch up and are levelling with the last two-year averages for this time of the year,” says Giraldo, adding that the end of summer will provide a good opportunity for in-store display and cross promotions.

Looking ahead, Giraldo says prices will continue to increase, which follows the seasonal trend for this time of year. “Quality control is our biggest focus, as we work to filter out defects,” says Giraldo. “The majority of Mexico is ending a crop cycle. The fruit is mature with high juice content but has thin and yellow skin that’s very susceptible to humidity related defects such as oil spots once the rains return to growing regions,” he says, adding that that also brings on the potential for stylar end rot.

<https://www.freshplaza.com/article/9128578/mexican-limes-lean-on-good-quality-supplies/>

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to dforsythe@nproduce.com and we will be happy to give you those current market conditions. Also look for our Spanish version that will be released on Monday and our Midweek Update released every Wednesday. Have a great week!

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Your Dedicated NPC, LLC Staff