



WEATHER UPDATE

Salinas— Sunny to partly cloudy next week. Highs in the 70s and lows in the upper 50s. **Oxnard**— Sunny to partly cloudy next week. Highs in the 70s and lows in the upper 50s. **Mexico (Culiacan)**— Sunny to partly cloudy next week with chances of thunderstorms next Saturday. Highs in the 100s and lows in the 70s. **Florida, Southern**— Cloudy with chances of scattered thunderstorms throughout the whole week. Highs in the 90s and lows in the upper 70s. **Idaho**— Sunny to partly cloudy next week. Highs in the 90s and lows in the upper 40s.

TRANSPORTATION

The National Diesel Average has been recorded at \$3.042 down \$0.001 a gal from last week and down \$0.197 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 is a slight shortage in North Carolina & South Carolina.**

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MARKET ALERT

AVOCADOS
BELL PEPPERS— RED & YELLOW
BLACKBERRIES
GREEN LEAF
ICEBERG LETTUCE
ONIONS
PARSLEY (Curly, Italian)
RED CABBAGE
RED POTATOES
ROMAINE LETTUCE/ HEARTS
STRAWBERRIES
SWEET POTATOES

MARKET OUTLOOK



Apples



QUALITY  SUPPLY 

As we look into the Summer Months (June/July/August) - it appears Washington is in pretty good shape. Golds variety will be the only variety where we will be coming right to the end with new crop just starting so it will be tight, especially with small sizes. Gr Smiths, no problem with supply throughout the summer but... like golds - small sizes (125,138cts) will be a challenge. Fruit size -peaking on 72/80/88cts. Reds/Galas/Fujis, good supplies throughout the summer. Smaller sizes are not as plentiful as larger sizes, but we will have them for our customers. Honeycrisp, we should be able to get through the first week of August - maybe 2-3-week gap.

Asparagus



QUALITY  SUPPLY 

The markets are climbing, and volume is limited this week. Larger sizes also remain very limited out West. Quality is dependent on growing region. Expect better volume in the next 4 weeks.

Avocados



QUALITY  SUPPLY 

The markets are steady. Loca has been released & growers are now certified to pick in MX. Unfortunately with the 4th being on Thursday, that will delay trucks heading to the border. Possibly a 2-tier market in the next week or so, for Loca & for the old crop. Loca is trending to be on the smaller side, with 48's & larger being a small % of the crop. It is also very clean, so #2 fruit will also be a small %. Difference in price between a #1 & #2 will tighten to \$2-\$3. Demand remains good for Peru, & most shippers are having a hard time keeping up, especially with delays at the ports. CA picked heavy last week, but it should be one of the last heavy weeks for them.

Bananas



QUALITY  SUPPLY 

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



QUALITY  SUPPLY 

Berries



ALERT- Blackberries continue to dwindle out of Mexico as we get closer to the end of their season. CA's production is slowly starting this week. Due to the previous rain & high temps, growers are seeing a significant drop in yields out of Northern CA. Expect to see shortages in supply & rising prices.

Blueberries out of Georgia are mostly done for the season. Due to heat-related issues, many farms in North Carolina are going day-to-day. Oregon & British Columbia are going to start within the next 10 days. Michigan about 2 to 3 weeks away.

Raspberries continue to produce good volume out of Mexico. There is some pressure on supplies due to the tighter than normal availability of Strawberries, Blueberries and Blackberries over the last few weeks.

MARKET OUTLOOK

Broccoli



Good supplies on broccoli continue this week. Growers are reporting good volume and good quality. Markets should be steady going into next week. No shortages or pro-rates to report at this time.

Brussels Sprouts



Steady supplies continue this week. Growers are looking to move volume with heavy supplies coming in. Market has also improved with prices back to normal. Good quality has also been reported with multiple growers. No shortages or pro-rates are been reported at this time.

Cauliflower



Cauliflower supplies are about normal. There is a bigger demand for cauliflower this week, this has caused prices to be \$3 dollars higher this week. Good quality is being reported by multiple growers. No shortages or pro-rates to report at this time.

Cantaloupes



Central California will be firing on all cylinders by the end of this week. Early cantaloupe fields provided a majority of smaller sizes but new fields scheduled to break this week are showing signs of larger fruit. Early fruit has been strong with excellent internal quality as brix levels have been in the 11-16% range.

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



Supplies are better this week. "FINALLY," the markets are back to normal and are not escalated. Good quality is being reported with multiple growers. No shortages to report at this time.

Corn



Corn out of the East and West are plentiful. Good demands for the summer continue but as expected the week after the 4th of July is traditionally a bit slower for the growers. Local growers all over the county are ramping up production.

MARKET OUTLOOK



Cucumbers



Cucumber supplies is somewhat steady. Georgia has some volume. North Carolina/New Jersey are coming up with better volume and able to take care of the local demand. Good Mexican supplies are coming through the Texas Valley and San Diego with great quality. Georgia growers will start wrapping their season in the next 10-15 days.

Eggplant



Eastern eggplant is in an oversupply situation this week. Other local production areas are expected to come online over the next 7-14 days. Western production has fully transitioned from the California desert to the Central Valley.

Grapes



Good volumes out of Mexico & Coachella Valley. Pricing is steady with steady demand. Overall quality of the fruit out of both regions are very clean, firm, and good color. Mexico should last 2-3 weeks before tapering off. Central Valley should next week with light volume, then build momentum gradually.

Green Beans



Green bean production and availability have improved. There's product available in VA, TN, NC, IN, and DE with no real quality issues. Western supply has also improved this week, as stronger volumes are coming out of CA and Eastern WA is underway. We also expect to see numbers out of Baja over the next 2-3 weeks .

Herbs



Alert- Parsley (Curly / Italian) –Parsley supplies continue to be very limited this week. Italian (flat) parsley has improved but curly is extremely short. Quality is being reported as fair to good. Prices remain escalated this week. No shortages or pro-rates are been reported at this time. Lemon grass cost has doubled & should stay firm for the summer. All other herbs are steady with good supplies.

Honeydews



Honeydew production will continue to be primarily 6/8s early on. Larger sized melons will remain limited until the next fields are ready next week. Early melons have been very clean externally with only minimal scarring compared to what the desert was producing. Brix levels were mostly in the 12-16% range dependent upon size.

MARKET OUTLOOK

MARKET ALERT

Iceberg



Supplies continue to be a challenge this week. Plants are still recuperating from the early June heat wave. Expect to see some quality issues on the outer leaves with fringe burn due to the excessive heat from 3-weeks ago. Keep in mind growers are harvesting 20% less yield than normal. No shortages are being reported. **Inform** customers to **inspect & wash** all lettuce items before serving. We anticipate the markets to be lower by the end of the week. **Alert includes all salad blends**– expect escalated pricing.

QUALITY  SUPPLY 

Kale



The market continues to remain steady with plenty of supplies. Quality is being reported as fair. Markets are expected to remain steady for the next few weeks.

QUALITY  SUPPLY 

Leaf



ALERT-Romaine Lettuce / Romaine Hearts/ Green Leaf – Supplies are still very limited and markets will continue to be escalated this week. Expect to see multiple quality issues with irregular sizing, cupping, fringe burn, twisting, & occasional internal burn. **Inform** customers to **inspect & wash** all lettuce items before serving. No shortages to report currently. **Alert includes all salad blends & leaf fillets as well**- Expect escalated pricing this week due to whole case commodities in short supplies.

MARKET ALERT

QUALITY  SUPPLY 

Red Leaf & Boston/Butter Leaf – Good supplies on these leaf items. But showing the same quality issues as the other leaf items above & demand is stable.

Tender Leaf



Markets remain elevated while supplies of leaf lettuces remain very limited. Most growers have limited production this week due to the holiday and to allow upcoming fields to gain size / weight. There are also reports of a small supply gap in place brought on by the late season rains this spring. Some of the effects of the heat wave are still visible in the form of sun scald, fringe burn and occasional internal defects.

QUALITY  SUPPLY 

Lemons & Limes



LEMONS - Lemons remain competitive as well in the bigger sizes, small fruit remains high and supplies remain tight. Seeing good quality and demand across the board. Expect pricing to rise weekly, fobs in mid \$30s. Larger sizes remain around \$20s.

LIMES – The lime markets are steady this week. Seeing good quality and good demand. Finally, out of the higher markets with FOBs \$16 and below.

QUALITY  SUPPLY 





MARKET OUTLOOK

MARKET ALERT

QUALITY



SUPPLY



Onions



Extreme Alert - The onion market remains at all-time highs in the \$18-23 FOB on jbo yellows across CA & NM. Sizing is smaller and quality remains spotty as well. Various shippers are dealing with little gaps here and there which is keeping this market up. Product will be tight and high until we get back to ID/OR late summer/early fall.

Onions, Green



QUALITY



SUPPLY



The market is steady with steady demand this week. Seeing good supplies with no quality issues being reported. Expect the market to remain steady going into next week.

QUALITY



SUPPLY



Oranges



The market remains steady. Seeing good demand. Oranges are very promotable and competitive right now, with Valencia and navels rolling as well. Valencia stocks are dominated by 88-count and larger sizes. California quality is very good: sugar levels range from 12 to 14 Brix.

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.

MARKET ALERT

QUALITY



SUPPLY



Peppers, Bell



Alert on Colored Peppers- Peak volume for Georgia is done. Growers expect some availability for the next 7 -10 days. South Carolina and North Carolina continue to ramp up volume so that helps to keep up with the East Coast demand. California fruit started to move up north. Expect supply to be hit and miss during this transition. Other local regions will start by the second part of next month.

QUALITY



SUPPLY



Peppers, Chili



Lighter volume will continue out of Central Mexico and Baja. Quality will remain good. In the East, GA has steady volume & a good varieties this week but will start to wind down as we move toward July.

QUALITY



SUPPLY



Pineapples



We are hitting some supply gaps as we are in the summer months, which is normal for this time of year. We are asking all customers to be flexible in their preferred sizing as supplies will remain tight through July and will skew to the smaller size profile during this time frame. On a positive note, the Teachers strike, which has caused major transportation delays appears to be over.

MARKET OUTLOOK



Potatoes



QUALITY



SUPPLY



Potatoes are steady, quality is still of high concern and that won't go away until new crop in Aug/Sept. Most FOBs are sitting around \$15+ with smaller spuds around \$13. Supply is diminishing as we get deeper into storage, expect prices to remain steady and slightly climb the next 8 weeks.

MARKET ALERT

Red Potatoes- ALERT Supplies are limited on colored potatoes. They are gapping in the west, no #2s available and anything you can find is at an extreme premium. Looks to hold for a couple of weeks until the pipeline is back up.

Squash



QUALITY



SUPPLY



Georgia's volume continues to drop. Growers forecast 10-15 more days before they wrap it up for the season. Yellow squash yields are way down and quality product is very limited due to excessive scarring and scuffing. There is more production on zucchini right now. Local supplies have started with production from multiple regions from east to west.

MARKET ALERT

Strawberries



QUALITY



SUPPLY



Many shippers are still seeing lighter supplies due to the rain and hot weather from late last month. Production is down up to 35% due to damage to green fruit and flowers during that time. Most growers are forecasting tight supplies for the next 2 or 3 weeks. As you know, weather will determine how fast the recovery will be in the upcoming weeks.

QUALITY



SUPPLY



Tomatoes



Overall volume is a bit lighter out of the East this week as the summer transition begins. South Carolina farms will finish crown picks over the weekend leaving only 2nd 's as production moves into next week. Production in South Carolina will continue for another 5-7 days depending on markets, weather, etc. Farms in Tennessee expect to start harvesting next week & will be joined by Virginia as well as Alabama & North Carolina will come online shortly thereafter. Supply is solid in the West. Baja & Eastern Mexico are producing a steady supply of vine ripe tomatoes while Northern California is up & running with mature greens.

QUALITY



SUPPLY



Watermelons



Good supplies are still available to load in Arizona and Texas. Quality out of Mexico is mostly fair. New crop is also available out of the desert & South Georgia. NC will come online around the middle of July. Quality is great from this region. The markets are low as summer demand continues to be light.



MARKET OUTLOOK

MARKET ALERT

Red Cabbage -Alert Supplies continue to be limited on the red cabbage with markets escalated this week. Most growers are reporting very low yields at the time of harvest. Quality has been reported as only fair at this time. Growers are anticipating better supplies as cooler weather is expected the next few weeks.

Sweet Potatoes – Extreme Alert There is an industry wide national shortage of sweet potatoes. Most suppliers are completely dry until late summer/early fall with new crop. The hurricane affected many growers, as well as increased demands and heavy rains. Prices are up and will continue to rise, and supply just isn't there. Recommend to open spec across the board in this category.

US: Lettuce prices soaring after June heatwave hit Salinas Valley

As romaine and iceberg lettuce crops grown in the Salinas Valley were destroyed by the mid-June heatwave, the prices of both have tripled in many stores around Northern California.

Heads of lettuce wilted significantly in the extended heatwave the week of June 9, with some parts of the Salinas region hitting triple-digit temperatures. As KSBW reports after talking with local farmers, the heat left 20 to 30 percent of the lettuce crop unusable, which has meant that many big-name buyers from the farms are getting far less than they've ordered — and leading to higher prices.

Leaf lettuce is the number-one crop in Monterey County, as the county's Farm Bureau reported in both 2017 and 2018. Romaine lettuce crops actually decreased around 12 percent between the two years due to the well-publicized E. coli outbreak, but 2018's lettuce production still accounted for \$733 million in value for farmers. Strawberries are the county's second biggest crop, with a value of \$698 million. The coastal climate around Salinas typically makes it ideal for lettuce production, but some years and some planting periods get surprises from the weather.

Lettuce production was also impacted by a particularly rainy May, which slowed down picking by about half, says Lathros. And picking all over the county has been impacted in the short term by President Trump's threats of ICE raids — one field supervisor reported that 15 fieldworkers failed to show up last week due to fears of a raid, according to *Monterey County Weekly*.

<https://www.freshplaza.com/article/9123208/us-lettuce-prices-soaring-after-june-heatwave-hit-salinas-valley/>



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!
Keeping You Informed,



Your Dedicated NPC, LLC Staff