

Weekly Market Review

September 21, 2017

Overview

Lemons, oranges, green onions, broccoli florets, and carrots continue to be in a very EXTREME MARKET. We are noticing a shortage in supply as well, which will continue until early fall. We expect to see a gap in supply, as most growers are done with Valencia's and navels will not start until the 3rd week of October. There is heat damage in almost all leaf and tender leaf products, including broccoli florets. Strawberries are poor in quality and we are seeing a short supply. Asparagus is also in an extreme market, but expected to improve next week. Melons and pineapples continue to be a good buy as well as Baby Bok Choy.

Market Alert

- Apples – **EXTREME**
- Avocados – **EXTREME**
- Asparagus – **EXTREME**
- Berries (strawberries, raspberries, blueberries, blackberries) – **EXTREME**
- Broccoli – **ESCALATED/EXTREME**
- Broccoli florets – **ESCALATED**
- Carrots – **EXTREME**
- Cilantro – **ESCALATED**
- Cucumbers – **ESCALATED**
- Garlic – **EXTREME**
- Green Onions – **ESCALATED**
- Lemons – **EXTREME**
- Oranges – **EXTREME**
- Onions – **ESCALATED**
- Potatoes – **ESCALATED**
- Grape Tomatoes – **ESCALATED**
- Cherry Tomatoes – **ESCALATED**
- Round Tomatoes – **ESCALATED**
- Roma Tomatoes- **ESCALATED (EAST)**

Good Buy

Let's hear it for baby bok choy! As this week's good buy, this leafy member of the cabbage family is thriving in the fields, showing amazing quality and freshness across the board. Unfamiliar on using this green veggie? Here is a pro tip: do not wash it until you are ready to use it. It'll help maintain its vitality.

Also, unused parts of baby bok choy can stay fresh in the fridge for up to 6 days. Be sure to separate the leaves and stalks before washing to ensure everything is thoroughly cleansed.

In stir fries, braised, in soups, grilled, roasted, or just plain raw: baby bok choy can do it all! It can even bring some savory variety to your fall pumpkin-flavored menu. This Steamed Pumpkin and Baby Bok Choy with Ginger Sesame Sauce is a must try:

Steamed Pumpkin and Baby Bok Choy with Ginger Sesame

Ingredients

- 2 Tablespoons/30ml extra virgin olive oil
- 2 teaspoons/10ml toasted sesame oil
- 3 Tablespoons/45ml of coconut aminos (or gluten-free tamari)
- 1 inch piece of peeled fresh ginger, finely grated
- 1 to 2 garlic cloves, finely minced
- A pinch of red pepper flakes (about 1/8th teaspoon or more depending on how spicy you want it)
- 4 heads baby bok choy, halved or quartered lengthwise
- 1 small kuri pumpkin, seeded, peeled and cut into thin slices
- 1 Tablespoon/7g of toasted sesame seeds








Directions

1. In a small saucepan or skillet, whisk together the olive oil, sesame oil, coconut aminos, grated ginger and garlic and a pinch of red pepper flakes. Heat gently until warm, cover and set aside.
2. In a large skillet or sauté pan fitted with a steamer basket, bring an inch or two of water to a boil. Add the pumpkin slices reduce to a simmer and cover and cook until tender (about 8 to 10 minutes depending on the thickness of your slices).
3. Remove the pumpkin slices and place on a large platter. Add the bok choy to the steamer basket and cover and cook until fork-tender (about 4 to 5 minutes).
4. Transfer bok choy to the serving platter; drizzle with the reserved ginger sesame mixture, top with toasted sesame seeds and serve immediately.








[Source.](#)

Weather

SOUTHEAST: Chance of thunderstorms going into the weekend, but looks to clear up next week with ample sunshine and warm temperatures in the forecast.








Thu 09/21	Fri 09/22	Sat 09/23	Sun 09/24	Mon 09/25	Tue 09/26	Wed 09/27
82° 59°	82° 58°	82° 55°	81° 55°	82° 57°	81° 58°	82° 58°
						
Chance of a Thunderstorm	Partly Cloudy	Partly Cloudy	Clear	Clear	Clear	Clear

BAKERSFIELD/ CENTRAL VALLEY: No major changes this week. Plenty of sunshine and mild temps the next 7

Thu 09/21	Fri 09/22	Sat 09/23	Sun 09/24	Mon 09/25	Tue 09/26	Wed 09/27
71° 52°	75° 55°	79° 57°	84° 60°	88° 62°	91° 65°	93° 67°
						
Partly Cloudy	Clear	Clear	Clear	Clear	Clear	Clear

to 10 days.

CENTRAL COAST: No major changes this week. Plenty of sunshine and mild temps the next 7 to 10 days.

Thu 09/21	Fri 09/22	Sat 09/23	Sun 09/24	Mon 09/25	Tue 09/26	Wed 09/27
66° 54°	67° 52°	72° 53°	78° 56°	79° 58°	83° 61°	84° 62°
						
Partly Cloudy	Partly Cloudy	Clear	Clear	Clear	Clear	Partly Cloudy

Transportation

Trucks are in good supply in California, Arizona, Washington and Texas. Freight rates are firm. Availability has tightened in Florida and Eastern Oregon.

Fruits & Vegetables

Avocados: EXTREME We continue to see very low production numbers out of Mexico; however, reports from the fields are that dry matter is improving. We should see weekly imports to the U.S. start to improve over the next several weeks. Markets will remain firm, but we will start to see some relief in FOB prices. Major contributing factor of this condition has been the fruits' inability to mature due to very poor growing conditions. Contract pricing will remain unsustainable and will be based on the market through the middle of October month, at the earliest. We are still watching on a day-to-day basis. At this time, there are no guarantees when availability will return to normal.

Bananas: Demand and quality are good and inventories are unchanged this week.

Grapes: Weather has started to cool down, so the days are longer and volume is picking up. Quality is good: Greens, the Samson Sorbet, and our Great Green label/variety are in. Quality on Scarlet Royals, Lindy Black and Red Globes are great! Fall Items have started, so the season is about to change.

Kiwi: Shipments are for the most part finished out of Chile. What is in storage will be it for the season. Still looking for California to begin harvesting over the next 3 to 4 weeks. Markets remain very active with limited availability on the horizon. Quality is still very nice.

Berries

Blueberries: EXTREME Blueberry availability will continue to decline. Quality is not good due to the heat.

Blackberries: EXTREME Blackberries are decreasing in volume. Quality is average due to the heat.

Raspberries: EXTREME Volume is light. Flavor and quality have decreased due to heat.

Strawberries: EXTREME The market is getting very active. The heat caused significant damage and quality is not good. We are seeing high prices and shortage in supply.

California / Arizona Citrus

Most shippers are done with Valencia's for the season. There are few larger sizes left. 113S-138S are virtually impossible to get on the open market. There will be a gap in the Valencia/navel season, as navels are not

expected to be ready until the 2nd to 3rd week of October. Import lemons, murrcotts, cara caras and clementine's are available. 140S and larger lemons will remain tight until D3 production is fully ramped up.

Navels/Valencia's: **EXTREME / VERY SHORT SUPPLY OR NO SUPPLY** There will be a gap between Valencia/Navel season. Import Navels are available, with few larger sizes left. Valencia's are EXTREMELY tight, especially 113-138S. Few organics are available. Domestic Navels are expected to be ready mid-October. Expect a tough year.

Lemons: **EXTREME** Domestic lemon supply will remain tight on larger sizes. South American/Mexican lemons are available, good quality. Import lemons are available on the east and west coast. New Zealand/Meyer lemons are available.

Limes: Limes are available. Recent weather in Mexico will have an impact on quality.

Grapefruit: California Summer Marsh and Rio Reds (Peruvian, also) are available in limited supplies. Organic is available. Mostly choice grade.

Specialties:

- California satsumas will get started mid-October
- Import Cara Caras are available in limited supply.
- Import clementine's are available.
- New Zealand Meyers are available.
- Peruvian Minneola's are available.
- Chilean murrcotts are available as well.

California Lettuce

Butter: Prices are stable. Quality is average due to the heat.

Green and Red Leaf: Quality is fair, as we are seeing fringe burn. Demand is steady. Supply is ok.

Iceberg Lettuce: Supplies are light this week. Quality is good. We are seeing lighter weights and yields in the fields.

Romaine: Good supply. Quality is overall fair to poor. We are still seeing fringe burn and yellowing on the outer leaves and other heat related issues.

Romaine Hearts: Supplies are good and prices are up. Quality is good to average; however, we can control some of the quality issues by peeling off some of the outer layers.

Eastern and Western Vegetables

HURRICANE IRMA UPDATE: We will see a very active market and potential supply interruptions on all east coast vegetable items due to the aftermath of Hurricane Irma. Several of our partner growers have sustained severe damage to infrastructure, as well as crops. Fortunately, the forecast calls for favorable weather in the region over the next several days, which will assist in the recovery process. We expect to see very active markets over the next two to three months due to the damage of the fall crops in North Florida and South Georgia. We are anticipating a bold recovery in the Immokalee and Naples area in the next 4 to 6 weeks barring no additional severe weather events.

Green Bell Pepper: Pepper supplies and quality are favorable; however, we anticipate a shift in sizing and lighter production due to cooler overnight lows in all growing regions. South Georgia is expected to regain some production in 2 to 3 weeks. However, weather impacts from Hurricane Irma are expected to impact quality and supply. California/ Central Coast production is very good, though we will need to keep a close eye on quality during the next 10 to 12 days due to this week's heat wave hitting the central valley and intercoastal regions. Currently, quality is outstanding and FOB prices are mostly unchanged.

Red Bell Pepper: Red Pepper Supplies are good this with additional intercoastal fields breaking. We expect good quality over the next week however this could change should the extreme heat levels remain constant for the next several days combined with higher than normal overnight lows. We could see this affect shelf life and lower yields over the next 10 to 12 days.

Yellow Pepper: Supplies have been manageable and expect good quality over the next week. FOB prices are mostly unchanged.

Mini Sweet Pepper: Good supplies expected over the next 7-14 days, deals available on volume.

Eggplant: Supplies are available out of South Georgia; however, we expect to see some quality issues due to flooding and wind damage from Hurricane Irma. There is still some product being shipped out of Michigan and quality has been fair. We are still seeing good supply in the west and expect to see new crop product out of Nogales mid-October.

English Cucumber: Supplies are mostly unchanged. We should see some improvement as greenhouse production in Mexico is anticipated to ramp up over the next 10 to 14 days. Markets remain mostly unchanged.

Cucumbers: ESCALATED We are beginning to see yields dip as the summer harvests out of the eastern growing regions show no relief in sight, as fall plantings in South Georgia have been damaged by Hurricane Irma. We expect to see escalated markets and potential supply interruptions through November. We are also seeing a slight production gap in the west due to field transitions which is putting additional pressure on an already decreasing supply. Quality in the west is good, but we still are seeing issues in the east. It is too soon to fully evaluate the damages to the offshore programs, but we will keep providing information as its supplied.

Green Beans: Supplies are good out of Michigan this week. Quality has also improved, seeing less rust and mildew issues. Supplies in the west have improved slightly as well however need to watch as there are some heat related issues which are expected to be ongoing through the remainder of the California season. FOB prices are mostly unchanged for next week.

Zucchini and Yellow Squash: Domestic supplies continue to shrink in the east as the Carolinas and Michigan production forecasts continue to drop due to seasonal cooler overnight temperatures. We are seeing daily increases in FOB quotes and quality remains marginal. We will see this market remain very tight through November as the fall transition crop in South Georgia has been severely damaged due to Hurricane Irma. In the west, high temperature, rain and humidity have impacted production in Fresno and Santa Maria. We expect to see lighter supplies and quality issues such as surface mold, pitting and scarring. We expect to see production begin in Nogales mid-October.

Herbs

California was hit with a major heat wave where we saw temperatures at over 100 degrees for almost a week. Fields suffered a little, but our farmers did a great job of keeping the fresh herbs protected.

EPAZOTE: It will be very limited due to the rains in Mexico and this should last for about two weeks.

OREGANO: It continues to be limited in supply and this should last for about 4 weeks.

BASIL: It has struggled a little, but supplies have not been affected as of yet.

All other fresh herbs remain steady.

HERB	SUPPLIES	QUALITY	COUNTRY OF ORIGIN
Arugula	Good	Good	USA
Basil	Good	Good	USA/MEXICO
Opal Basil	Good	Good	USA/MEXICO
Thai Basil	Good	Good	USA/MEXICO
Bay Leaves	Good	Good	COLUMBIA
Chervil	Fair	Fair	USA
Chives	Good	Good	USA/MEXICO
Cilantro	Good	Good	USA
Dill	Good	Good	USA/MEXICO
Episode	Good	Good	MEXICO
Lemongrass	Good	Good	USA
Marjoram	Steady	Good	USA
Mint	Good	Good	USA
Oregano	Good	Good	USA
Italian Parsley	Good	Good	USA
Rosemary	Limited	Good	USA

Sage	Good	Good	USA/MEXICO
Savory	Good	Good	USA
Sorrel	Good	Good	USA
Tarragon	Good	Good	MEXICO
Thyme	Good	Good	USA
Lemon Thyme	Good	Good	USA
Lavender	Good	Good	USA
Lime Leaves	Good	Good	USA
Hora Santa	Good	Good	USA

Melons

Good movement on cantaloupe has created a steady market. Overall, supply has started to decrease, but there is still another 3-4 weeks to go with most growers providing less supply each week than anticipated. All growers are now into the LSL (Harper) varieties which are more conducive to the fall conditions (cooler temps and rain). These varieties have proven to be very strong against the elements while still providing good internal quality. Central Arizona is 14-17 days from getting started.

There has been a lot of activity with the honeydew market since late last week which has resulted in stronger pricing. We could see a push slightly higher by the end of this week and into next week. Honeydew quality has been clean with good sugar levels.

Watermelon: The Westside region will continue to have supply through the middle of October while production in the Midwest is winding down. Seed varieties used in the fall for the past few seasons have been expanded, as they proved to be resistant to cooler weather that hits that region in October. Central Arizona should be ready in early October. Markets have firmed up due to lighter volume this week. Guatemala started planting last week with an early to mid-November start expected.

Mixed Vegetables

Artichokes: Steady market with higher prices. Quality is good.

Arugula: Supplies are good for baby and wild. Quality is fair. Prices are rising.

Asparagus: EXTREME Due to Hurricane Irma, we are very limited in supply. We have not been able to receive product as quickly as were planning. Flights are still being prioritized for passengers, leaving very limited space for cargo. We do expect flights for cargo to become more available over the weekend. Our growers will be extremely limited on supply for the remaining part of the week, but this market will improve next week.

Bok Choy: Quality is good and we are seeing some higher quotes on WGA cartons.

Broccoli: ESCALATED/EXTREME Prices are high and in escalation. Supplies are on the lighter side due to the heat and being pro-rated. Quality is average. **Broccoli florets are ESCALATED** and we are seeing a shortage in supply.

Brussels Sprouts: Higher prices and tighter supplies remain but are leveling out. Quality is improving.

Carrots: EXTREME MARKET Due to the heat and rain, we are seeing some quality issues and a shortage on jumbo supplies as well as tables and cellos.

Cauliflower: Market is good; supplies are plentiful and quality is very good. Prices are low.

Celery: Oxnard is done and we are now in Salinas for 100% of supply. Prices are stable and quality is good.

Corn: Volumes are declining in all markets; however, demand is flat. The market is mostly unchanged, and quality is still good on yellow, white and bicolor.

Cilantro: ESCALATED Quality is poor; there is still yellowing with some decay. Prices are high.

Fennel: Supplies for the week will be good and quality is good.

Garlic: EXTREME We just finished our 2017 harvest this week. We have fortunately harvested our most normal crop since 2014. Our yields were pretty much as expected, nothing extraordinary, but a good crop of garlic. Presently, demand for domestic garlic still exceeds supply. We had a slight lull the first week of back to school/Labor Day, but otherwise, demand has been good and strong.

Ginger: Chinese ginger supplies have tightened up putting upward pressure on prices across the country. This is still a better dollar value than ginger from Hawaii, Brazil, Thailand and Costa Rica.

Green Cabbage: Supply is good on both coasts, quality is good.

Green Onions ESCALATED:

Iced: Prices are up, quality is poor with heat related damage.

Iceless: This market is steady and we are seeing heat related quality issues.

JICAMA: Normal prices and quality is good.

Kale (Green): Demand is steady and quality is just fair. Supplies are starting to lighten up with product being affected by heat damage.

Mache: Availability is adequate.

Napa: Supplies are normal. Quality is good.

Parsley (Curly, Italian): We are seeing prices that are still higher, the warm temperatures have cause quality issues.

Radishes: Quality is good and supply is slowing down. Expect to see stronger markets through the summer.

Red Cabbage: Quality and sizing have been great with good color. Market is stable.

Snow and Sugar Snap Peas: Snow and sugar snap peas are in high demand with good quality.

Spinach (Bunched): Supply is good and quality is fair due to heat related issues. We are seeing prices rise.

Spinach (Baby): Baby and clipped spinach supplies are good. Quality is fair due to heat related issues and occasional reports of mildew. Prices are somewhat up.

Spring Mix: There is plenty of product with quality being fair.

Onions ESCALATED

All supplies are shipping from the northwest and all indications are showing that supplies are significantly shorter than previous seasons. It is likely we will see pricing remain elevated as demand exceeds supplies. While sizing continues to be a challenge, we are starting to see some improvement. Sizing is peaking mostly on mediums and jumbos with much fewer big onions. We can expect that this will continue get better as we transition from the harvest onions into storage onions, but even with this, it is likely that we will see pricing on large onions remain elevated this season and supplies to remain tight.

Potatoes: ESCALATED

Demand on consumer packs in Idaho is good. Prices for 5's and 10's are steady at this time. Demand on cartons is fair with deals on straight loads of larger cartons.

Harvest is going very strong at this time. We have had some rain late last week, and expect more this week, but work is moving along in the fields. We have cool temperatures which allows the growers to get this crop stored in good condition. Most growers are going to the fresh market and putting their crop into storage. Growers are also fulfilling their contracts with the processors. The crop at this time is approximately 30% harvested.

We have experienced very tight truck supply out of the state the last week and looks to continue into this week. We do not expect this situation to ease anytime in the near future.

TOMATOES- **EAST**

HURRICANE IRMA UPDATE: We will see a very active market and potential supply interruptions on all east coast vegetable items due to the aftermath of Hurricane Irma. Several of our partner growers have sustained severe damage to infrastructure as well as crops. Fortunately, the forecast calls for favorable weather in the region over the next several days which will assist in the recovery process. We expect to see very active markets the next two to three months due to the damage of the fall crops in North Florida and South Georgia. We are anticipating a bold recovery in the Immokalee and Naples area in the next 4 to 6 weeks barring no additional severe weather events.

- **Rounds: ESCALATED** Supplies in the east are tight through all eastern regions. All sizes and quality will be hit and miss due to the weather-related impacts of Hurricane Irma. We expect a severe supply shortage over the next several months due to the damages done to the fall transition crops in North Florida.
- **Romas: ESCALATED** Supplies are lighter this week and prices are mostly unchanged. Quality remains an ongoing issue throughout the eastern growing districts due to the ongoing rain issues. We expect a severe supply shortage over the next several months due to the damages done to the fall transition crops in North Florida.

- **Grapes: ESCALATED** Supplies have tightened up significantly out of the Carolinas and Virginia. Prices have escalated and triggered. Quality is becoming an issue as the region continues receiving precipitation. We expect a severe supply shortage over the next several months due to the damages done to the fall transition crops in North Florida.
- **Cherries: ESCALATED** Supplies have tightened up significantly and will continue to see quality issues. We expect a severe supply shortage over the next several months due to the damages done to the fall transition crops in North Florida.

TOMATOES- WEST AND MEXICO

WEST COAST WEATHER STATEMENT: Last week California experienced severe weather including rain, high humidity and wind. Combine these events with several heat waves over the past several weeks, and it does not impact crops in a positive manner. We are seeing heavy bloom drop and damage to fruit maturing on the plants. We expect an early completion of the tomato and squash season in the west adding additional concerns for shortages of supply over the next few months as Florida begins to recover from Irma.

- **Rounds: ESCALATED** Vine-ripe production continues through Otay and McAllen. The green market in California continues to struggle due to heat related quality issues such as lower shelf life and soft fruit. We could see a potential GAP between the California season and the fall crop in Nogales due to a potential bloom drop as well. We are receiving reports of production issues in Southern Baja as well as added demand from the east as a full evaluation of the damages caused by Hurricane Irma continue. We anticipate a steady increase in FOB prices over the next several weeks.
- **Romas:** Supplies are improving daily through Otay and McAllen. California is lighter than normal. We are seeing downward pressure on pricing; however, the heat could turn things around. California quality will be in question due to the excessive heat. We continue to see tender fruit that will not have good shelf life.
- **Grapes: ESCALATED** Crossings have improved slightly this week from Baja; however, quality and color issues are persistent due to weather related impacts. FOB prices are mixed this week.
- **Cherries: ESCALATED** Supplies are a tad better this week however demand and prices remain firm. Quality and sizing are good.

APPLES, PEARS, & TREEFRUIT

Apples EXTREME: Demand from retail is extreme causing shortages industry wide. Golds and Granny's remain extremely short causing a shift in demand to all other varieties. We expect to see this continue through the rest of the season. Offshore deals are also very active due to the shortages in the Pacific Northwest. Gala and Red Delicious are steady and good quality.

Pears: They started in California and we will see them in Washington soon. Anjou pears are steady and supply is good.

STONE FRUIT: DOMESTIC LOADING CENTRAL VALLEY, CA (CHERRIES- WASHINGTON)

- **Apricots:** Done for the season. Thank you for your support.
- **Yellow Peaches:** Packing Autumn Jewel this week. There is excellent quality and condition, and large sizes. Next up is the Autumn Queen that will be the last variety for this season. Supplies are available through September.
- **White Peaches:** Winding up on Lady Empress and Pearl Lady. Full Moon will start next week. There will be good supplies through the month of September, and good volume will be available on the Full Moon variety for September.

- **Yellow Nectarines:** Winding up for the season with Orange Heirloom Variety. There will be limited supplies for 2 more weeks.
- **White Nectarines:** Currently harvesting Artic Snow. Artic Mist will start next week and have good supplies through month of September.
- **Red Plums:** Good supplies on all sizes, and excellent quality and flavor. Supply is plentiful on Flavor Fall variety. There are good supplies on excellent eating fruit through September. We have many new late varieties that will be available through November: October Red, Fall Fiesta, Ruby Sugar, and Autumn Red.
- **Black Plums:** Good supplies on Black Onyx, Black Jack and Black Honey. Angelino's will start next week and have good supplies through October.
- **Ruby Red Velvet Apricots:** Done for the season. Thank you for your support.
- **Red and Black Pluots:** We will have supplies on pluots through October; sweet and juicy varieties.
- **Mottled Pluots:** Mega Dino and Dinosaur Egg varieties are available now. Good supplies available through month of September.