

# Weekly Market Review

March 22, 2018

## Overview

Most growers will start transitioning to Salinas now and over the next few weeks. California has experienced extreme rain over the past few days and quality on a majority of commodities will most likely be affected on in those areas. We will be watching the market closely and will be sure to keep you updated. Broccoli and lettuce have improved, while strawberries are showing quality issues and high prices.

## Market Alert

- Asparagus – **ESCALATED**
- Avocado- **ESCALATED**
- Lemons – **ESCALATED**
- Limes – **EXTREME**
- Mushrooms – **ESCALATED**
- Oranges – **ESCALATED**
- Strawberries – **ESCALATED**

## Watch List








Due to the recent weather, quality on commodities such as celery, lettuce, berries, citrus, broccoli and cauliflower in California markets has been affected.

## Transportation








Rates, although higher than expected, have eased as overall demand is lower. However, we do expect to see rates begin to increase as we approach the summer months as there is still an overall shortage of drivers. ELD's will be creating longer transit times which, as demand increases, will force rates to firm.

## Weather








**SOUTHEAST:** The forecast shows plenty of sunshine, warm days and mild evenings. Perfect growing conditions!

Thu 03/22	Fri 03/23	Sat 03/24	Sun 03/25	Mon 03/26	Tue 03/27	Wed 03/28
74°   44°	78°   49°	84°   57°	86°   60°	87°   65°	81°   57°	85°   59°
						
Clear	Clear	Clear	Clear	Clear	Clear	Clear








**HERMOSILLO:** A mixed forecast is predicted with clouds, sun and fluctuating temps. Highs will start off hot and gradually settle in the 70's.

Thu 03/22	Fri 03/23	Sat 03/24	Sun 03/25	Mon 03/26	Tue 03/27	Wed 03/28
96°   63°	93°   64°	89°   58°	83°   54°	76°   48°	74°   48°	77°   51°
						
Partly Cloudy	Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Clear	Clear

**CULIACAN:** There will be a return of warm weather and plenty of sunshine this week.

Thu 03/22	Fri 03/23	Sat 03/24	Sun 03/25	Mon 03/26	Tue 03/27	Wed 03/28
96°   65°	98°   64°	98°   57°	100°   56°	96°   58°	89°   51°	89°   49°
						
Clear	Partly Cloudy	Partly Cloudy	Clear	Clear	Clear	Clear

**YUMA:** Reports show a mix of sun and clouds over the next week with conditions gradually improving and warmer temps coming next week.

Thu 03/22	Fri 03/23	Sat 03/24	Sun 03/25	Mon 03/26	Tue 03/27	Wed 03/28
85°   61°	82°   58°	80°   54°	72°   49°	71°   50°	73°   52°	79°   55°
						
Overcast	Clear	Partly Cloudy	Clear	Clear	Clear	Clear

## **Good Buys**

### **Eggplant and Green Peppers!**

This week's good buy report is a double whammy! Both eggplant and green peppers, two versatile and textural vegetables, are showing fairly nice quality and steady prices at the moment, making it the perfect time to pair the two together.

Eggplant is known for providing a plant-based spin to popular comfort food dishes, while green peppers can truly freshen up a plate. Not to mention the nutritional superpowers that both bring to the table including fibrous benefits, heart-healthy impacts, and plenty of essential vitamins and minerals.

So, try the pairing out for yourself! This easy vegan take on a classic Philly Cheese Steak will open menus to a whole new world and become an instant favorite.

### **Vegan Philly Cheese Steak**

#### *Ingredients*

- 1 large eggplant, peeled and cut into strips
- 1 cup of my [Buffalo Homemade BBQ Sauce](#) or your favorite store-bought
- 2 Tbs olive or sunflower or canola oil
- 3 cloves garlic, peeled and pressed
- salt, pepper to taste

#### *For the Vegan Cheese:*

- 1 batch [3 Ingredient Vegan Cheese Sauce](#) + add 1/2 cup nutritional yeast
- 1 batch Maple Mustard Sauce from the [Vegan Lentil Burger](#)

#### *Optional add-ons:*

- Fried bell pepper strips, onions and mushrooms, more hot sauce to serve.

#### *Directions*

1. Start with mixing BBQ Sauce, the hot sauce (optional), and garlic. Combine well with eggplant slices in a bowl, season with salt and pepper. Let sit to marinate for around 10 minutes.
2. While the eggplant is marinating, make the cheese. Simply combine all the ingredients in the bowl of a blender. Add the nutritional yeast and blend until really smooth and creamy. Set aside.
3. After marinating the eggplant stripes, heat oil in a pan and fry them for around 15 minutes. Use medium heat, and stir regularly.
4. To assemble your sandwich, start with some vegan cheese on your favorite bread, followed by eggplant, finishing with some sauce again.

## **Fruits & Vegetables**

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**Avocados: ESCALATED** Sizes in escalation include: 48, 60 and 70 #1's. Weekly volumes are expected to dip slightly due to Holy Week in Mexico, while harvest levels increase in California. Premium grade fruit has become short and remains heavy on grade 2 and small fruit. In California, volumes are expected to increase this month; however, heavy rain this week will limit local harvesting.

**Bananas:** Demand on this item remains firm; however, prices are gradually easing. Quality will remain inconsistent due to weather that has impacted the growing regions in Guatemala, Mexico, and Costa Rica. This only further complicates an already short banana market across the country due to virus impacts. We expect fruit to be greener than average for the next several weeks until inventories rebalance with riper fruit becoming available. We ask for your patience and understanding during this time as fruit will certainly be greener and might need to be stored on site to further ripen.

**Pineapples:** Demand remains firm, quality is going to be inconsistent, and supplies could be interrupted as major weather issues have impacted the growing regions in Guatemala, Mexico and Costa Rica.

**Grapes:** Good quality continues on the offshore programs, and pricing is normal for this time of year (mid 20's for premium sizing and deals being made on small fruit). Quality continues to be good. Pearlettes out of Mexico should begin crossing mid-May with the desert to follow.

**Kiwi:** California supplies are tighter this week, but quality is good. Lighter supplies are also expected on Italian fruit coming through the East Coast. Market are firming up.

## **Berries**

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**Blueberries:** Availability and quality are good.

**Blackberries:** The market is rising, quality is good, and supply is limited.

**Raspberries:** Volume is average, quality is average.

**Strawberries: ESCALATED** The market is high; we are seeing very poor quality, higher prices, and shortages in supply.

## **California / Arizona Citrus**

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Demand on oranges and lemons have improved; however, it's still a lower yield than years past. Upcoming issues with weather may potentially create issues with supply and quality. We will keep you posted.

**Navels/Valencia's: ESCALATED** Although there has been improvement, we are still seeing a shortage in supply and high (but improving) prices. Smaller sizes are more available than larger sizes at this time.

**Lemons: ESCALATED** This is a very active market, prices are still higher than normal. Quality is good.

**Limes: EXTREME** Market remains high and supplies are still very tight.

**Grapefruit:** Texas grapefruit is available. Florida Star Ruby/Red is available. California grapefruit has started.

## **Specialties:**

- Pink Lemons are available.

- Gold Nugget mandarins are available.
- Ojai Pixie Tangerines are available.
- Only a few Minneola's are left.
- Domestic Blood oranges and Cara Caras are available showing good quality.
- New Zealand Meyers are available.
- Halos and Cuties are available.
- Few Pummelos are left.

### **California Lettuce**

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**Butter:** Supplies are normal and quality is average.

**Green and Red Leaf:** Quality is good; however, there is some blistering and peel.

**Iceberg Lettuce:** Quality is average. The market is active as production continues to be lighter than normal.

**Romaine:** Quality and prices are average. Supply is lower than normal.

**Romaine Hearts:** Supplies are lighter than normal, quality is good, and prices are average.

### **Eastern and Western Vegetables**

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*Coachella is expected to begin production first week of April. Squash and eggplant will start the season followed by green bells, beans, red bells and corn.*

**Green Bell Pepper:** Supplies out of Florida are good, though they are a little light on medium and larger sizes. There is good volume on choice. Nogales are still off due to cooler weather; however, this will get better as the weather improves this week. FOB prices are still steady, and quality is fair as production is still coming from older fields. We expect this to improve by mid-April when California begins harvesting.

**Red Bell Pepper:** Markets are firming up because production numbers are down due to the cooler weather from a few weeks back. Quality is still very nice. We expect to see improvements over the next 7 to 14 days.

**Yellow Pepper:** Production is light and is pushing the market higher. Quality is still very nice.

**Mini Sweet Pepper:** Markets remain mixed by region. Good supplies are available in the west; supplies in the east are a hit or miss.

**Eggplant:** Warmer weather continues to improve availability on both coasts; FOB prices are down this week and quality is very nice.

**English Cucumber:** There are excellent supplies crossing through Nogales and McAllen.

**Cucumbers:** Cooler weather, as well as the offshore deal, is winding down and will continue to keep markets firm in the east. West coast supplies are improving as Baja ramps up production and shipping through Otay Mesa. Quality remains great.

**Green Beans:** There are excellent growing conditions currently in the East. Markets are steady and quality is good. In the West, volume is winding down through Mexico and prices are ticking upwards. Overall quality is outstanding.

**Zucchini and Yellow Squash:** Volume will continue to improve daily in the East on zucchini and yellow squash. Markets are off significantly; but quality has improved as well. In the West, as the transition back to Hermosillo is completed, quality and supply remain excellent and markets are down. Quality is outstanding.

## **Herbs**

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**LAVENDER:** Local frost has affected this crop and we will be out for several weeks.

**OPAL BASIL:** Due to weather conditions, Opal Basil will have little to no availability until May or June.

**SAVORY:** Supplies should replenish in about two weeks.

All other herbs are steady in supply and quality.

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

<b>Thyme</b>	<b>Limited</b>	<b>Good</b>	<b>USA</b>
<b>Lemon Thyme</b>	<b>Good</b>	<b>Good</b>	<b>USA</b>
<b>Lavender</b>	<b>Limited</b>	<b>Good</b>	<b>USA</b>
<b>Lime Leaves</b>	<b>Good</b>	<b>Good</b>	<b>USA</b>
<b>Hora Santa</b>	<b>Good</b>	<b>Good</b>	<b>USA</b>

## **Melons**

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**Cantaloupe:** The cantaloupe market has firmed up despite steady volume due to strong retail promotions for the Easter holiday. It is anticipated that once the weather turns, the market will reestablish itself as we move to the middle of the month and spring promotions. Internal quality remains consistent with good brix levels (11-14%) and stronger coloring starting to appear externally.

**Honeydew:** Good demand has kept the market steady. There has also been a swing back to larger sized fruit (4/5) ct. Quality has been clean with brix levels mostly in the 11-13% range. Our growers anticipate an active market for the next three weeks.

**Watermelon:** Seedless watermelons remain steady with decent demand on larger sizes (4/5s). Movement on smaller sizes has been limited. Growers of seedless melons from Central America have just about cleaned up for the season.

## **Mixed Vegetables**

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**Artichokes:** We are seeing much higher prices and poor quality.

**Arugula:** Product is tightening up and quality is fair due to the winds and colder weather.

**Asparagus:** **ESCALATED** Production from Mexico is slowing down and Peru doesn't have enough volume to cover the demand. Lack of supplies is driving prices up. We are also seeing a shortage in supply on larger sizes. We do not expect to see product improve for some time.

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

**Broccoli / Broccoli Florets:** Supplies are normal. Quality is average.

**Brussels Sprouts:** Supplies are light and quality is average.

**Carrots:** We are seeing both good quality and volume.

**Cauliflower:** Supplies are normal. We are seeing higher prices, although they have improved.

**Celery:** This market is steady, both quality and price are good.

**Corn:** This market has firmed up due to the cooler weather. We anticipate improved volume over the next 2 weeks.

**Cilantro:** Supplies are very light and quality is fair due to the colder weather.

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

**Garlic: EXTREME** We are about 50% done with the 2017 crop. Supplies will remain tight between now and July. Prices remain high.

**Ginger:** Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Costa Rica and Honduras and Peru with no major quality issues being reported.

**Green Cabbage:** Supplies have tightened and markets have firmed in the East. We are seeing improving volume and lower FOB prices in the West, and quality remains favorable.

**Green Onions:** Market is better. Expect slightly higher pricing in 2 weeks due to Easter and better demand.

**JICAMA:** Markets remain firm due to ongoing short supplies and will continue to see some quality and shelf life issues.

**Kale (Green):** Quality and supplies are fair.

**Mache:** Availability is adequate.

**Mushrooms: ESCALATED** Mushroom growers are still recovering from the severe damage in the South and Southeast, as well as Puerto Rico. Hurricane Harvey and Irma have resulted in a tightening market, and the American Mushroom Institute has said it expects supply to be affected for several months. We are starting to see some improvement of supply and will keep you informed of any changes.

**Napa:** Supplies and prices are steady. Quality is good.

**Parsley: (Curly, Italian)** Quality and supplies are fair.

**Rapini:** Supplies have improved and markets are down. Quality has improved.

**Radishes:** Supplies are steady and quality is good shipping through Arizona and Florida.

**Red Cabbage:** Quality and sizing have been great showing good color. The market remains firm in the East as well as Texas. West Coast volume is improving.

**Snow and Sugar Snap Peas:** Snow and sugar snap peas supplies are steady through Miami.

**Spinach (Bunched):** Supplies are available and quality is fair due to the recent colder weather.

**Spinach (Baby):** Baby and clipped spinach supplies are good and showing some quality issues due to colder weather.

**Spring Mix:** Supplies are available. Quality is fair due to weather.

## **Onions:**

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Demand has increased, but Mexico continues to cross more supplies each day. With this, there has been a downward pressure on pricing for all colors of the onion market. Texas is roughly one week away from shipping domestic product and they are expected to have a good supply as well. The Imperial Valley is expected to start around April 15<sup>th</sup> and all indications are showing they will also have a good supply of onions. We are expecting to see the current market trends continue through transition until regions finish.

## **Potatoes:**

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Demand has increased across the board and all pricing is starting to increase. We expect to see pricing get stronger in April. Some of the Burbank crop appears to be rougher which has put some pressure on the Norkotah crop. There appears to be no transportation issues as trucks are plentiful and rail cars are available. Most growers are still running Norkotahs and Burbanks, and we will see the Norkotah supply last until the end of April to early part of May.

## **TOMATOES - EAST**

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- **Rounds:** Lower volume will push prices higher this week; medium sized fruit is getting a premium as it's the tightest available. Overall quality is very good. We expect the market to remain unstable for 10-14 days as the transition to spring production begins.
- **Romas:** Volume remains light but demand has caused the market to remain flat this week. We thought the spring crops would begin this week however, due to weather, it appears they are behind another week at minimum. Quality remains nice throughout Florida on Romas.
- **Grapes:** Volume and demand are light this week and markets are beginning to fall as new crops begin. Quality is still very nice.
- **Cherries:** Supplies have lightened up, but demand remains light. The spring crop starts in about 2 weeks. Quality is great.

## **TOMATOES - WEST AND MEXICO**

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- **Rounds:** Overall volume is down and markets have firmed up. We expect a 2-3 week period where quality and FOB prices will be erratic. In two weeks, Sonora production will begin which should ease the Mexican vine ripe market back down.
- **Romas:** Volume is ramping up and demand is down which is causing downward pressure on pricing. Quality is still great.
- **Grapes:** Grape FOBs are dropping due to lack of demand. Transition to spring production has already begun as well. Quality remains nice on the last bit of production out of Sinaloa. New crop quality is very nice, though very large fruit sizes are being reported.
- **Cherries:** Markets remain mostly unchanged despite lighter supplies. Quality is very nice.

## **APPLES & PEARS**

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**Apples: PROMOTIONAL VOLUME AVAILABLE ON FOOD SERVICE/SMALL SIZED FRUIT** New crop now available we are seeing the pressure on the market decrease and shortages diminish. Excellent quality available on all varieties; however, we are seeing less production of Golden Delicious as the trees are being pulled and replaced with more favorable varieties. Please make note that volume orders on food service grade apples must be pre-booked to ensure they are not packed with PLU stickers.

**Pears:** Bosc, Bartlett and D'Anjou are available out of Yakima and Wenatchee Districts.