

# Weekly Market Review

July 26, 2018

## Overview

Most commodities are steady. Valencia's and lemons are still in an **ACT OF GOD**. Green bean prices remain higher. Avocado supplies will remain tight through August. We may see increases in prices and slightly tighter supply on Limes.

## Market Alert

- Lemons – **ACT OF GOD**
- Mushrooms – **ESCALATED**
- Oranges (Valencia's) – **ACT OF GOD**

## Watch List

**Avocados:** Total industry volume in the U.S. is expected to decline week over week and will likely cause a tight market as we move through July into August.

**Green Beans:** The bean deal out East continues to be split. Between quality concerns and low volume, FOBs are high. Things will start to lighten up in the West as we move into August. We are already in a sporadic supply situation with some quality struggles. Look for FOBs to push upwards over the next few weeks.

**Limes:** We are seeing somewhat of an active market on limes. We may see increases in price and slightly tighter supply.

## Transportation - EXTREME

With full implementation of the ELD now in place as well as a nationwide shortage of available trucks on the market, rates are expected to continue to rise through the summer. Rates could jump as high as 20% over the next several weeks and remain the way until the market settles.

## Weather

### ASHVILLE:

Thu 07/26	Fri 07/27	Sat 07/28	Sun 07/29	Mon 07/30	Tue 07/31	Wed 08/01
86°   64°  Clear	86°   64°  Partly Cloudy	82°   63°  Chance of Rain	83°   66°  Chance of a Thunderstorm	78°   65°  Chance of a Thunderstorm	75°   65°  Chance of a Thunderstorm	75°   64°  Chance of a Thunderstorm

### JALISCO:

Thu 07/26	Fri 07/27	Sat 07/28	Sun 07/29	Mon 07/30	Tue 07/31	Wed 08/01
83°   62°  Chance of a Thunderstorm	81°   61°  Chance of a Thunderstorm	81°   61°  Chance of a Thunderstorm	80°   61°  Chance of a Thunderstorm	80°   63°  Chance of a Thunderstorm	81°   62°  Chance of a Thunderstorm	82°   62°  Chance of a Thunderstorm

### SALINAS:

Thu 07/26	Fri 07/27	Sat 07/28	Sun 07/29	Mon 07/30	Tue 07/31	Wed 08/01
72°   55°  Partly Cloudy	73°   54°  Clear	72°   55°  Clear	71°   55°  Clear	73°   55°  Clear	74°   56°  Clear	74°   55°  Clear

## COACHELLA:

Thu 07/26	Fri 07/27	Sat 07/28	Sun 07/29	Mon 07/30	Tue 07/31	Wed 08/01
119°   89°  Clear	118°   85°  Clear	112°   85°  Clear	110°   86°  Clear	113°   87°  Clear	113°   87°  Clear	115°   85°  Clear

## SELMA:

Thu 07/26	Fri 07/27	Sat 07/28	Sun 07/29	Mon 07/30	Tue 07/31	Wed 08/01
106°   69°  Clear	107°   69°  Clear	107°   70°  Clear	104°   71°  Clear	105°   71°  Clear	105°   72°  Clear	104°   70°  Clear

## Good Buys

### Blueberries!

Summer snacking wouldn't be the same without fresh from the farm blueberries! They are delicious, extremely good for you, and require no peeling or pitting. Just throw a couple in your mouth and enjoy all the wonderful things that blueberries have to offer!

When trying to identify the best of the best blueberry, look for firmness, smoothness, and a dark blue/purple/black color. Soft and wrinkly berries are most likely past their prime. Even the mere presence of undesirable berries will expedite the aging process for the rest.

Also, blueberries with a reddish tint aren't ripe, and once unripe blueberries are picked, they won't ripen at all. However, you can definitely still use these reddish blueberries for cooking.

Get to work savoring blueberry season to make these awesome Blueberry-Lemon Hand Pies!

### Blueberry-Lemon Hand Pies

#### Ingredients

##### Crust

2½ cups all-purpose flour  
1 teaspoon kosher salt  
1 cup (2 sticks) chilled unsalted butter, cut into pieces

##### Filling and Assembly

All-purpose flour (for surface)  
4 cups fresh blueberries  
4 tablespoons cornstarch  
2 teaspoons finely grated lemon zest  
2 tablespoons fresh lemon juice  
½ teaspoon kosher salt  
½ cup sugar, plus more for sprinkling  
1 large egg, beaten to blend

## **Directions**

### **Crust**

- Pulse flour and salt in a food processor just to combine. Add butter and pulse until texture resembles very coarse meal with a few pea-size pieces of butter remaining. Drizzle  $\frac{1}{4}$  cup ice water over and pulse, adding more ice water by the tablespoonful as needed, until dough just holds together when squeezed. Divide dough in half and form into 2 disks, wrap in plastic, and chill until firm, about 2 hours.
- Do Ahead: Crust can be made 3 days ahead. Keep chilled, or freeze up to 1 month. Let sit at room temperature 15 minutes before rolling out.

### **Filling and Assembly**

- Preheat oven to 350°. Roll out 1 disk of dough on a floured surface to a 12" square. Cut into six 6x4" rectangles; reroll scraps and cut out 2 more rectangles. Repeat with remaining disk of dough.
- Toss blueberries, cornstarch, lemon zest, lemon juice, salt, and  $\frac{1}{2}$  cup sugar in a large bowl to combine. Brush edges of rectangles with half of egg and spoon about 2 Tbsp. blueberry mixture on one half of each rectangle, leaving a  $\frac{1}{2}$ " border. Fold dough over and press edges to seal, then crimp with your fingers or a fork. Transfer to 2 parchment-lined baking sheets and freeze 15 minutes (this will help pies hold their shape while baking).
- Brush pies with remaining egg and sprinkle with sugar. Cut a few slits in tops of pies to vent. Bake pies, rotating baking sheets halfway through, until juices are bubbling and pastry is golden brown, 35–40 minutes (juices will run onto parchment).
- Let hand pies cool on baking sheets 5 minutes, then transfer to wire racks. Serve warm or at room temperature.

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## **Fruits & Vegetables**

**Avocados:** WATCH LIST Total industry volume in the U.S. is expected to decline week over week and will likely cause a tight market as we move through July into August.

**Bananas:** Demand on this item remains firm; however, prices will continue to ease. 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. Due to improving inventories, we should no longer see ripening issues.

**Pineapples:** Demand remains firm, quality is good, and supplies are stable. FOB quotes at the port are mostly unchanged.

**Grapes:** This is continuing to be a mixed market out of the Central Valley based on sizing. Deals are being made on smaller fruit while larger sizes continue to draw a premium. We are seeing good volume on the following varieties: Sugraone, Flames and Summer Royals.

**Kiwi:** New Crop, Chilean fruit is available. Supply and quality are both good.

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## **Berries**

**Blueberries:** Quality is improving, and prices are coming down.

**Blackberries:** Quality is improving, and prices are coming down.

**Raspberries:** Quality is improving, and prices are coming down.

**Strawberries:** Quality is improving, and prices are coming down.

### **California / Arizona Citrus**

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The lemon market has become very EXTREME. We are seeing a shortage in supply as well as much higher prices. The demand for Valencia's has far exceeded supply. Markets will remain high as the domestic crop has come up extremely short this year.

**Valencia's: ACT OF GOD** Our Valencia growers in the San Joaquin Valley were affected by extreme heat which caused post bloom conditions in our fruit. As a result, this has caused a lighter crop and there is virtually no small fruit available. At this time, our growers suggest moving to a larger size Valencia. We also have one supplier that will not have any small fruit at all and has evoked an **ACT OF GOD**. We apologize for this disruption and recommend that you take oranges off your menu or change to a larger size at this time. We are monitoring this situation closely and will update you with more information regarding Valencia's as the week continues. Thank you again for your support and understanding.

**Lemons: ACT OF GOD** As stated previously, this is primarily due to the very hot weather which has matured the fruit much faster than normal leaving us with virtually no supply and very standard grade fruit. Please note, prices will be very high and product will be short until this is resolved. Other contributing factors:

- Arrivals from Argentina into the East Coast are fewer than expected.
- Chile has been sending fruit to locations outside of the US, in expectation of Argentina arrivals into the USA, which as noted above, are not happening at the usual volume.
- Various rain events in Argentina and Chile causing gaps in harvest/packing.
- Uncertain Mexico supply remains in question in terms of total volume for the season due to cold weather which slowed fruit production at the beginning of the year.

Between now and October (when desert production is in full swing), we expect to see severe price increases. Produce Alliance recommends accepting flexibility in size and grade as a key to mitigating this situation.

**Limes: WATCH LIST** We are seeing somewhat of an active market on limes. We may see increases in price and slightly tighter supply.

**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.

### **California Lettuce**

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**Butter:** Supplies are lighter than normal. Demand is good and quality is average.

**Green and Red Leaf:** Red leaf quality is good. Demand is average and supplies are normal. Green leaf supplies are normal showing good demand and quality.

**Iceberg Lettuce:** Supplies are on budget but the market has been very steady. Quality is very good.

**Romaine:** Supplies are slightly above normal. Demand is average and quality is good with occasional light fringe burn.

**Romaine Hearts:** Supplies are slightly above normal. Demand is average and quality is good.

### **Eastern and Western Vegetables**

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**Green Bell Pepper:** In the East, the green bell pepper market is higher than usual. There are plenty of local offerings, but no major volume to meet full demand. Once Michigan begins next week we will see FOBs decline. Quality is mixed by region. In the West, with Bakersfield mostly out of the mix, Stockton and Coastal CA are doing a good job supplying the region. FOBs are starting to fall and will continue to do so as the East supply increases. Quality is mostly excellent, but some areas that have experienced high temps are seeing trouble.

**Red Bell Pepper:** Production in the West is steady which means FOBs are mostly stable. Quality is excellent.

**Yellow Pepper:** Production has eased bringing the market off with deals being made on choice. Quality is very nice.

**Mini Sweet Pepper:** Good supplies are available. These are excellent for fajitas and stir fry, call for deals on mini sweet peppers!

**Mixed Chili Pepper (Jalapeno, Anaheim, Poblano, and Serrano):** Supplies remain steady in the East on core pepper varieties while quality in the west is hit or miss as transition on domestic product is slow to start. Baja continues crossing decent quality on the core line of product.

**Eggplant:** Great volume continues from the East with steady FOBs and plenty of local deals available. The hot temperatures in the West are causing a decrease in volume which is driving FOBs upward a few dollars. Quality is fair to good.

**Cucumbers:** Limited availability continues in the East as Michigan gets off to a very slow start. Demand is firm with light supplies. FOBs are high, but fairly steady. Quality has been nice. Demand from the East is still putting pressure on the West, but supplies have been increasing. FOBs are falling, but a little slower than expected due to higher demand. Quality is excellent.

**Green Beans:** **WATCHLIST** The bean deal out East continues to be split. Between quality concerns and low volume, FOBs are high. Things will start to lighten up in the West as we move into August. We are already in a sporadic supply situation with some quality struggles. Look for FOBs to push upwards over the next few weeks.

**Zucchini and Yellow Squash:** Although the growing regions are very fragmented in the East, there is still plenty of squash to go around. FOBs are steady. Quality continues to be nice from all regions with the exception of occasional scarring on yellow squash. In the West, Santa Maria is producing great quality with a little movement in pricing by about \$2. This is a result of Baja going through a short gap period with lighter than usual supplies. However, there is still enough product to meet demand.

## **Herbs**

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Mother Nature has been turning up the heat in almost all of the California growing regions this week. Temps are running about 10+ degrees higher than usual. Listed below are some of the side effects from this:

**MARJORAM, THYME, AND OREGANO** All are flowering due to the heat wave. We are trimming back as much as we can, but you will see some occasional flowers on these items.

**DILL:** In the heat, fresh dill bolts which means that the stems grow faster than normal and are thicker. We will be trimming.

**ROSEMARY:** Product is showing a small amount of tip burn.

**BASIL:** No issues as our growers continue to watch over this crop.

**CHIVES:** There are no issues with chives as they are grown in Mexico year-round. The local chives are having a lot of tip burn.

HERB	SUPPLIES	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Good	USA
Basil	Steady	Good	USA
Opal Basil	Steady	Good	USA
Thai Basil	Steady	Good	USA
Bay Leaves	Steady	Good	COLOMBIA
Chervil	Steady	Good	USA
Chives	Steady	Good	MEXICO
Cilantro	Steady	Good	USA
Dill	Steady	Good	USA
Epazote	Steady	Good	MEXICO
Lemongrass	Steady	Good	USA
Marjoram	Steady	Good	USA
Mint	Steady	Good	USA

Oregano	Steady	Good	USA
Italian Parsley	Steady	Good	USA
Rosemary	Steady	Good	USA
Sage	Steady	Good	USA
Savory	Steady	Good	USA
Sorrel	Steady	Good	USA
Tarragon	Steady	Good	MEXICO
Thyme	Steady	Good	USA
Lemon Thyme	Steady	Good	USA
Lavender	Steady	Good	USA
Lime Leaves	Steady	Good	USA

## Melons

**Cantaloupe:** The cantaloupe market continues to ease as more product becomes available out of the valley. Thanks to the near-perfect weather conditions, we are seeing stable and very consistent harvest numbers. Sizing is still leaning on the larger side, quality on the new crops is outstanding, and brix levels are at 12-14% with occasional higher levels with a good external appearance showing even netting and full slips. Some deals in the east are being offered on the Athena variety in bins.

**Honeydew:** The honeydew market is now stable and production is in full swing out of the valley. Quality remains favorable, the sizing mix is heavy with 5 and 6 count, and the sugar is outstanding.

**Watermelon:** Seedless watermelon market has eased back to normal. Supplies are available in Georgia and Missouri with other local regions expected to start soon. There is also a steady supply available out of California.

## Mixed Vegetables

**Artichokes:** Quality is excellent, and demand is good.

**Arugula:** Quality and supplies are fair.

**Asparagus:** The weather in Mexico and Peru continues to affect sizing of jumbo asparagus which has been smaller than normal. We are working with our growers to determine when we can expect sizing to return to normal. We apologize for any inconvenience this may have caused and will continue to monitor the situation and keep you updated.

**Bok Choy:** Quality is average and demand is fair.

**Broccoli / Broccoli Florets:** The market and supplies are steady. Demand is good.

**Brussels Sprouts:** Supplies are light and quality is good. Prices are steady.

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

**Cauliflower:** Supplies remain steady. Quality is fair.

**Celery:** Supplies are higher than last week. Demand is steady and quality is fair.

**Corn:** Good volume continues to become available on yellow and white product out of the San Joaquin Valley corn market (yellow, white and bi-color). Good supplies are also available out of Carolinas, Indiana and Illinois. Good time to promote, quality is excellent.

**Cilantro:** Supplies are light due to quality.

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

**Garlic:** 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 are improving with supplies ramping up throughout the Midwest (Georgia is now done). Sizing is still smaller with larger product availability slowly improving. West coast volume and prices are mostly stable.

**Green Onions: Iced** - The market remains sluggish due to crossings from New Mexico and plenty of local home grown in eastern growing areas. **Iceless** - The market is good and should remain steady.

**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 good.

**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 demand are steady.

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

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

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

**Red Cabbage:** Markets are a bit tighter as lighter numbers are still coming out of Ohio. Quality has been hit or miss while sizing remains good. Central coast production is good; however, with lighter volume in the East, the market has firmed up in the West.

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

**Spinach (Bunched):** Supplies and quality are fair due to wind burn and heat damage.

**Spinach (Baby):** Baby and clipped spinach supplies are good, and quality is fair.

**Spring Mix:** Supplies and quality are good.

#### **Onions:**

Onions are now in full steam out of both the San Joaquin Valley as well as New Mexico. Quality is strong at this point, and yellow supplies overall are plentiful. Size profiles on yellow onions are now flipping and there will be more mediums than jumbos, colossals and super colossals. Rainy weather has hit the New Mexico valley the last 4 days which has stopped harvest causing a brief shortage in supply, but once they are back into the fields we should see back to normal. Red onions in both areas have been very short, and we have seen a swift increase in price. In a typical season, California red supplies can make up for shortages in New Mexico, but due to planting delays, there have been gaps in supply out of California. Reds will likely remain elevated for much of the summer, but as California re-enters the market with good supplies in the coming weeks, things will start to level off. Washington winter onions are around in small supply at the moment, and their direct seed crop will start in the next 4-5 weeks.

#### **Potatoes:**

The current Burbank storage crop is winding down and the market has leveled off. Some of the larger Carton prices have lowered because many growers are looking to finish their crop. Quality is fair with much pressure bruising and internal issues. Growers are slowing down to grade as hard as possible with lower pack-outs. Supplies are expected to remain short until the new Norkotahs crop becomes available around the beginning of August. Transportation has been challenging and rates have continued to increase.

#### **TOMATOES - EAST**

- **Rounds:** Rain has stalled harvest for the last 3 days; however, it hasn't affected total volume available. FOBs are steady with plenty of fruit available. Prices may increase in the next 7 days if the rain continues. Quality has not been affected. Fruit is excellent from all regions.
- **Romas:** Product is available in many local areas in the East with Tennessee and Alabama being the primary areas. FOBs are flat and quality is excellent from all areas.
- **Grapes:** Supplies are primarily coming from Virginia. Recent rains are pushing FOBs upward \$2-4 dollars. Quality is still good despite the rain.
- **Cherries:** Supplies are primarily coming from Virginia. Recent rains are pushing FOBs upward \$1-2 dollars. Quality is still good despite the rain.

#### **TOMATOES - WEST AND MEXICO**

- **Rounds:** Big volume is still coming from the West. Some growers are slowing production due to the abundance of supply and lack of demand. However, this is not having an effect on FOBs. Market prices will remain the same into next week. However, there is a somewhat split market with lower quality fruit

available for a rock bottom price. Temperatures continue to press close to above the 100 degree mark, impacting quality. Most CA tomatoes are soft, full red and have a very short shelf life.

- **Romas:** The market continues to feel upward pressure with Baja & Oceanside the primary regions. There is a \$2 split between the growing areas. There is still plenty of fruit to meet demand. Quality is varied farm to farm, but overall has been decent.
- **Grapes:** Baja & Eastern Mexico are both producing only moderate supply. FOBs have shifted upwards about \$4 as demand stays firm. Quality remains excellent.
- **Cherries:** Baja's supply has tightened up just enough to push prices upward \$1-2. Good quality is still available.

## **APPLES & PEARs**

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**Apples – Northwest:** We will continue to have good supply of the major varieties of apples through the spring and summer. We have finished packing some varieties of apples for the season so the emphasis for balance during the season will be on the six or seven remaining varieties. The quality, condition, and color on almost all varieties looks very good, and since we normally harvest the late storage apples first in the season I expect the condition on the remaining production to be very good.

**Apples – Northeast:** There is light volume on reds out of New York and Chilean Granny Smith through the port of Philadelphia.

**Pears:** Both Anjou and Gold Bosc pears are available especially on the larger (70's to 100's) sizes, but they are beginning to wind down for the season. Most of the supply that is left in the Northwest will either come from the Hood River Oregon area or from the Wenatchee area in Washington.

## **STONE FRUIT AND CHERRIES**

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- **Plums:** Moderate supply and steady demand has kept a firm FOB market on the red and black varieties out of the San Joaquin Valley.
- **Peaches:** Supplies are good on yellow and white tray pack as well as volume fill out of the San Joaquin Valley. In the Southeast, ½ Bu's are available on yellow flesh varieties.
- **Nectarines:** Supplies are good on yellow and white tray pack as well as volume fill out of the San Joaquin Valley
- **Cherries:** This is a mixed market based on sizing out of Yakima and Wenatchee. Quality is very nice.