

Weekly Market Review

November 8, 2018

Overview

The Salinas Valley growing season will be coming to an end soon. Please refer to the general end dates for Salinas and start dates for Yuma provided. Brussels sprouts, green bell peppers out of Coachella, yellow squash and zucchinis out of Nogales and GA are all good buys.

Transition Schedule – Fall 2018

Salinas End: October 26 - November 17

Yuma Start: November 7 - December 3

Over the next few months, please keep in mind that optimal temperatures must be maintained as strictly as possible throughout the supply chain. In the past, we have found that late season leafy green vegetables will not hold up as well as the mid-season leafy greens if temperatures are not properly managed. Please actively take the necessary steps to maximize shelf life as this is very important this time of the year.

Market Alert

- Avocados – **ACT OF GOD/FORCE MAJUERE**
- Cilantro – **EXTREME**
- Corn – **EXTREME**
- Green Beans – **ACT OF GOD**
- Green Peppers – **ESCALATED**
- Green Onions – **EXTREME**
- Lettuce (Romaine, Iceberg) – **ESCALATED**
- Mushrooms – **ESCALATED**
- Oranges (Valencias) – **EXTREME**
- Sugar Snap Peas – **EXTREME**
- Tomatoes (Romas, Grapes) – **ESCALATED**

Watch List

- Mixed Chili Pepper (Jalapeno, Anaheim, Poblano, Serrano)
- Round Tomatoes (East, West, and Mexico)
- Snow Peas
- Sweet Potatoes and Yams

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 be above normal through the remainder of the summer. We are seeing an average increase of 15 to 20 percent over last year's comps.

Weather

COACHELLA:

Thu 11/08	Fri 11/09	Sat 11/10	Sun 11/11	Mon 11/12	Tue 11/13	Wed 11/14
84° 53°	82° 44°	81° 48°	81° 48°	79° 47°	78° 50°	81° 51°
						
Partly Cloudy	Clear	Clear	Clear	Clear	Clear	Partly Cloudy

HERMOSILLO:

Thu 11/08	Fri 11/09	Sat 11/10	Sun 11/11	Mon 11/12	Tue 11/13	Wed 11/14
89° 57°	87° 55°	84° 55°	84° 54°	82° 54°	83° 53°	82° 54°
						
Clear	Clear	Clear	Partly Cloudy	Clear	Clear	Clear

JALISCO:

Thu 11/08	Fri 11/09	Sat 11/10	Sun 11/11	Mon 11/12	Tue 11/13	Wed 11/14
83° 55°	83° 56°	78° 56°	75° 54°	77° 54°	75° 51°	71° 52°
						
Clear	Clear	Clear	Chance of a Thunderstorm	Partly Cloudy	Partly Cloudy	Clear

SALINAS:

Thu 11/08	Fri 11/09	Sat 11/10	Sun 11/11	Mon 11/12	Tue 11/13	Wed 11/14
75° 43°	77° 40°	72° 39°	74° 40°	74° 43°	72° 42°	69° 42°
						
Clear	Clear	Clear	Clear	Clear	Partly Cloudy	Clear

MOULTRIE:

Thu 11/08	Fri 11/09	Sat 11/10	Sun 11/11	Mon 11/12	Tue 11/13	Wed 11/14
76° 64°	77° 49°	59° 44°	63° 51°	69° 60°	62° 35°	54° 34°
						
Chance of a Thunderstorm	Chance of a Thunderstorm	Clear	Partly Cloudy	Rain	Rain	Partly Cloudy

PALMETTO:

Thu 11/08	Fri 11/09	Sat 11/10	Sun 11/11	Mon 11/12	Tue 11/13	Wed 11/14
85° 69°	84° 69°	82° 64°	84° 68°	85° 70°	81° 55°	65° 54°
						
Partly Cloudy	Clear	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy

Good Buys

Each week, our team spotlights commodities based on how favorable prices, quality, and supply are in the market. Stay ahead of the trends and look to these good buys for their stellar performance in the fields! Please see each individual product for more information below and reach out to your PA representative for more information on adding this to your order guide.

Commodity	Market Update	Produce Expert Tip
Brussels Sprouts	Plentiful supplies and great quality.	Brussels sprouts are ready to satisfy Thanksgiving cravings. Add another flavor dimension to tender, roasted Brussels by pairing with sweet fennel and a burst of tart pomegranate seeds!
Yellow Squash and Zukes out of Nogales, FL and GA	Readily available supply out of the West, and good volume and quality out of Nogales.	Warm up menus with these typically end of summer seasonal vegetables by tossing into a hot soup with rosemary, parsley and paprika.

Fruits & Vegetables

Avocados: ACT OF GOD/ FORCE MAJEURE At this point in time, there is no resolution to the avocado strike and we do not have a date when harvesting will resume. Without harvesting for 10 days, we will not have much of any fruit for the next week. Our team is waiting to hear what the new negotiations between packers and growers will bring. Once harvesting begins, it will take up to two weeks to have fruit ripe and in place to ship to distributors on a national basis. Thank you for your cooperation and we will be sure to continuously provide you with updates.

Bananas: Demand on this item remains firm and supplies are expected to remain good through the rest of the year. Quality is good.

Pineapples: Good volumes and high-quality product are predicted for October as sizing has and will continue to improve on larger counts. We do expect good volumes for the remainder of the year.

Grapes: There is mostly Scarlet Royal and Allison varieties for red grapes right now. Vintage red grapes are just beginning to harvest. Autumn Kings are the bulk of the green seedless left to go. Overall, most growers will be finished harvesting in about 10 days with some already finished. Some red varieties will be the last to be picked. There are a lot of grapes in the cold storages as this is one of the largest grape crops on record.

Kiwi: Good supplies available on Chilean product.

Berries

Blueberries: Blueberry supplies are down and supplies are tight. Low volumes are expected for the next few weeks.

Blackberries: Blackberry production has slowed down. Hurricane Willa is creating a disturbance and is anticipated to be followed by a tropical storm. Supplies are expected to be tight prices are trending higher through late November.

Raspberries: Raspberry volume will remain stable into November.

Strawberries: The heat and the rain in the Northern growing area of California is causing the berries to show some quality issues. Supply is currently short and prices are rising.

California / Arizona Citrus

The lemon market is improving and prices are coming down. Markets will remain higher than the previous years as the domestic crop has come up extremely short.

Valencia's: EXTREME This market will tighten back up until the navel crop starts.

Lemons: The market is showing improvement with new crop out of CA with very few supplies coming out of Mexico.

Limes: Quality is good and prices remain fairly low in the market.

Grapefruit: CA grapefruit will get started towards the end of November. TX and FL grapefruit is currently available.

Imports/Specialties available:

- Domestic Satsuma mandarins
- "C1" mandarins
- Chilean clementines
- Halos/Cuties start in November
- Chilean Cara Caras (few available)
- Domestic Kiwi
- Domestic Cara Caras starting at the end of this month

California Lettuce

Butter: Supplies are light, and demand and quality are both good.

Green and Red Leaf: Green leaf supplies are slightly below normal, but demand is good. Quality has been good with some lighter weights. Red leaf supplies are lighter than normal. Demand is average, and quality is good.

Iceberg Lettuce: ESCALATED Supplies are slightly below normal, but demand is good. Quality has been good with some lighter weights.

Romaine: ESCALATED Supplies are slightly below normal. Demand is very good and quality is clean, with some minimal fringe burn, cupping, and lighter weights.

Romaine Hearts: ESCALATED Supplies are lighter than normal and demand is very good. Quality is good with hearts almost fully cupped.

Eastern and Western Vegetables

Green Bell Pepper: ESCALATED Most of the mature pepper was lost in Hurricane Michael; however, surprisingly a lot of the young plants survived. Unfortunately, with the bloom drop, we are feeling the tight market pressure already. Supply remains short but with Florida production ramping up, we are seeing the market ease back slightly. Quality is mostly good. California transition continues to the desert and markets are down in the West as well. Quality in the West is outstanding while Mexico is still two weeks out. Supplies will remain snug through the middle of November.

Red Bell Pepper: Supplies are snug this week and prices have increased due to volume out of Canada decreasing daily. Quality is good but expect active markets through the middle of the month.

Yellow Pepper: Supplies are snug this week and prices have increased due to HH volume out of Canada decreasing daily. Quality is good and expect active markets through the middle of the month.

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, Serrano): WATCH LIST Chili Peppers are tight across the country due to weather-related issues in all growing regions.

Eggplant: GA has decent supply considering Hurricane Michael. FL is looking to start in the next week. Weather permitting, it should be a smooth transition. FOBs are steady and quality is good. There is no shortage of eggplant out West as the transition starts to wrap up. FOBs are steady with great quality available. Good supply is available out of Nogales and quality is very nice.

Cucumbers: GA is still suffering from Hurricane Michael, but fortunately there is light volume coming from Plant City that is able to help the East. FOBs are down going into the week. Quality has been mostly good, but there are scattered impacts due to rains. The West is improving daily as volume ramps up through Nogales and McAllen. Baja is finally starting to build some decent numbers after all the recent rainfall. Because of this, FOBs are falling around \$3-5. Quality has been mostly good, but there are some scattered impacts due to rains.

English Cucumbers: Good supplies are now available from Spain and Holland eliminating pro-rates as well as showing decreases in the market. We should continue to see improvements; new crop from Mexico is ramping up daily and quality is very nice.

Green Beans: ACT OF GOD Green Beans are extremely short in the southeast; supplies are good in the - Coachella.

Zucchini and Yellow Squash: Surprisingly, most growers have rebounded rather quickly from Hurricane Michael. FOBs are down about \$2 with relatively good quality available considering the amount of wind the area is receiving. Plant City has light supply, but FL will really ramp up in about 14 days. Supply is readily available out of the West as well. Santa Maria is done while Nogales continues to produce good volume with good quality. FOBs are down.

Pumpkins: Steady supplies continue

Herbs

TARRAGON is the only fresh herb that is short in supply.

HERB	SUPPLIES	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Good	USA
Basil	Steady	Good	USA/MEXICO
Opal Basil	Steady	Good	USA
Thai Basil	Steady	Good	USA
Bay Leaves	Steady	Fair	COLOMBIA/USA
Chervil	Steady	Good	USA
Chives	Steady	Good	MEXICO
Cilantro	Fair	Fair	USA
Dill	Steady	Good	USA
Epazote	Steady	Good	MEXICO
Lemongrass	Steady	Good	USA
Marjoram	Fair	Fair	MEXICO
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	USA/MEXICO
Thyme	Steady	Good	USA
Lemon Thyme	Steady	Good	USA
Lavender	Steady	Good	USA
Lime Leaves	Steady	Good	USA

Melons

Cantaloupe: Rains from earlier this month in AZ have really pushed the sizing into larger fruit and have negatively affected yields. 6Js and 9Js are the predominant sizing currently. There is expected to be limited production over the next few weeks from Central AZ and Imperial Valley. Quality out of this region continues to be fair to good due to the poor weather that hit during the growing cycle.

Honeydew: Honeydew production varies in this region as some growers do not even bother growing dews because of the influx of Mexican production this time of year. Good volume is currently crossing through Nogales with mostly big fruit (4/5s) and some 6s. Smaller fruit is very scarce in AZ.

Watermelon: The seedless watermelon market is mixed due to lighter supply, mostly a result of heavy rain in Mexico. Demand remains good and quality is fair. Supplies are loading out of the San Joaquin and Nogales.

Mixed Vegetables

Artichokes: Quality is excellent, and demand is good.

Arugula: Quality is fair, with possible mildew due to recent rain followed by warm days. Product is available.

Asparagus: Prices are steady but should increase after next week in preparation for Thanksgiving. Mexico had good volume and quality. Peru is slowing down and volume is light. Quality is good.

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

Broccoli / Broccoli Florets: Supplies are light this week and will continue to remain light as we transition to the desert. The demand is good and the market is steady.

Brussels Sprouts: Brussels sprout supplies are plentiful and quality is great. Use this opportunity to add more Brussels sprout sides to your Thanksgiving menu!

Carrots: We are seeing both good quality and volume.

Cauliflower: Quality is very nice with bright white color. Demand and markets are steady. Supplies are slightly up right now.

Celery: Supplies are lower this week; however, markets are much better. The next two weeks show slightly lower volume than anticipated. Quality is good in Salinas; however, supplies for the Thanksgiving pull and in early December might be very short.

Corn: **EXTREME** Corn is still very tight out of the Southeast and is limited in the West (Coachella).

Cilantro: **EXTREME** Supplies are good and quality is fair.

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

Garlic: The market is about 50% done with the 2017 crop. Supplies are steady and prices remain high on domestic product.

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 and prices are trending downward.

Green Onions: EXTREME Iced: Markets are steady, with demand exceeding supply this week. Supplies are still extremely short crossing from Northern Mexico. Additionally, demand due to Eastern local growing deals being finished will keep upward pressure on the market price.

Iceless: Similar to iced, the market is steady with demand exceeding supply this week. We will continue to see light supplies this week from Northern Mexico.

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 are close to normal this week. Demand is steady and quality is good.

Parsley: (Curly, Italian) Quality 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: Supplies are improving and prices are trending downward.

Sugar Snap Peas: EXTREME Sugar snap peas will be EXTREMELY tight for the next 3+ weeks, this is going to affect the volumes available for Thanksgiving. Pricing will be higher and will be prorated by 50%.

Snow Peas: WATCH LIST Snows peas are coming in steadily, but there is not a lot of volume is available. Our teams are keeping an eye on this as pricing rises.

Spinach (Bunched): Quality is fair with possible mildew. Product is readily available.

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

Spring Mix: Supplies are good and quality is fair.

Sweet Potatoes and Yams: WATCH LIST This market has spiked due to heavy damage in the Carolinas. Growers are currently assessing the damage, so it is still too soon to react. However, supplies are still good out of Mississippi. We are reviewing daily and will continue to keep you posted.

Onions:

The Northwest is finished with harvest. From here on out, we will be shipping exclusively out of storage. Quality is strong, and sizing and yields are very good. The onions have full skin and will have good shelf life. We are seeing a surplus of Colossal and Super Colossal in better supply, which has resulted in some reduced pricing on these items. Medium onions are on the tighter side due to the profile being heavy to larger onions. White onions have decreased in price as well with better supplies available. Reds remain very plentiful, and we have seen those markets settle out. There are straight load red deals available in Washington below USDA market price. Overall, the season appears to be leaning toward a more 'normal' year in terms of size, yield and quality. What was once expected to be a very large crop has reduced size in part to the heat wave that the Northwest has been experiencing over the last several weeks.

Potatoes:

Harvest has concluded, and all growers are coming out of storage. There has been Burbank and Norkotah availability, and the Norkotah profile remains on the larger side. While the Norkotah crop has been on the larger side, the Burbanks have been showing smaller sizes. Demand has increased significantly with the holidays approaching, and pricing has reflected this. Quality has been excellent and transportation has been a challenge.

TOMATOES - EAST

- **Rounds: WATCH LIST** Volume from the East is not expected to ramp up until around late November as things head south. Temperatures have been abnormally warm which has stunted the growth cycle and resulted in a larger volume of medium size and less extra-large & large sizes. Additionally, with the West wrapping up, demand has strengthened for Eastern tomatoes for now and pricing is fairly steady to just slightly up. Quality has been good to excellent for the most part; however, occasionally there is a field rotation showing weaker quality. Quality is expected to improve as we move into new fields.
- **Romas: ESCALATED** There are only a handful of Romas in the East and most of the volume is staying local. Palmetto is still 10-14 days from any decent numbers. FOBs are still high but steady week over week. Quality is mostly good for what is available, but there are the occasional fields with weaker quality. This is expected to improve in the upcoming weeks as volume improves.
- **Grapes: ESCALATED** Volume has slightly dipped, tightening up supply just slightly. Again, things in Palmetto are just average right now, but improvement is expected in the next 10-14 days. Quality is mostly good; however, we are seeing some minor imperfections on most lots at this time.
- **Cherries:** Cherry supply has been steady. There has been no change in demand, supply, or FOBs. Good quality is available.
- **Organic Tomatoes:** Good supplies on organic tomatoes have ramped up from our grower.

TOMATOES - WEST AND MEXICO

- **Rounds: WATCH LIST** All major players are done at this time. Demand has moved to either the limited volume from Mexico and the East Coast. Baja has slightly begun, but not enough volume to meet demand. Eastern Mexico will have sporadic supplies over the next month and mainland Mexico will begin with mature greens in early December.
- **Romas: ESCALATED** CA is done. Mexico is slowly picking up volume, but demand is still very strong from the East. This is keeping pricing higher and even pushing it up a couple of dollars. Quality from Mexico has been good to excellent.
- **Grapes: ESCALATED** Cooler temperatures, rain saturated fields, poor production numbers from Baja, and strong demand from both coasts have pushed FOBs upward significantly. Quality is poor to fair at best. We recommend keeping a very tight inventory.
- **Cherries: WATCH LIST** Supply is still very snug, but steady. Look for FOBs to remain constant for next week. Quality is poor to fair at best.

APPLES & PEARS

Apples: There are great supplies of all apple varieties out of Washington, New York, California, Pennsylvania, Michigan. We are also seeing local product available throughout the US with a full range of sizes as well. Quality is at its best.

Pears: New crop Bartlett pears have started with good supply available especially on the larger (70's to 100's) sizes. New crops of Bosc and D'Anjou pears are also now available.

STONE FRUIT

- **Red and black plums are available**