



### ASHVILLE, NC:

Thu 8/6	Fri 8/7	Sat 8/8	Sun 8/9	Mon 8/10	Tue 8/11	Wed 8/12
82°   64°F	83°   63°F	85°   64°F	85°   65°F	84°   65°F	85°   65°F	85°   65°F
						
Scattered Thunderstorms	Scattered Thunderstorms	PM Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms

### OXNARD, CA:

Thu 8/6	Fri 8/7	Sat 8/8	Sun 8/9	Mon 8/10	Tue 8/11	Wed 8/12
68°   56°F	67°   56°F	67°   55°F	66°   54°F	65°   54°F	66°   55°F	67°   55°F
						
Partly Cloudy	Partly Cloudy					

### SALINAS, CA

Thu 8/6	Fri 8/7	Sat 8/8	Sun 8/9	Mon 8/10	Tue 8/11	Wed 8/12
69°   58°F	69°   57°F	73°   58°F	75°   57°F	72°   57°F	70°   57°F	69°   56°F
						
AM Clouds/PM Partly Cloudy	AM Clouds/PM Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

### JALISCO, MX:

Thu 8/6	Fri 8/7	Sat 8/8	Sun 8/9	Mon 8/10	Tue 8/11	Wed 8/12
86°   69°F	84°   69°F	86°   67°F	83°   67°F	84°   67°F	85°   67°F	85°   67°F
						
Thunderstorms	Thunderstorms	PM Thunderstorms	Thunderstorms	PM Thunderstorms	PM Thunderstorms	Thunderstorms

### Good Buys

Commodity	Market Update	Produce Expert Tip
<b>Cantaloupe</b>	All growers in the California westside region intentionally scaled back production by at least 20% in anticipation of a decrease in demand due to COVID-19. Challenges remain ahead of us as some growers have already contended with labor shortages which could impact future production causing an unintentional shortage. Current cantaloupe sizing has been primarily 9/12s but some growers are still contending with mostly jumbo fruit (6J/9J). Quality remains at optimum levels which is expected this time of year. Overall, fruit has been solid with good color and consistent brix levels in the 12-15% range with excellent flavor profile.	Cantaloupe is a sweet and juicy melon that pairs well with a salty combo, such as prosciutto. Try making a cantaloupe and prosciutto salad with balsamic, fresh mozzarella, and arugula. Gather all of these ingredients in one bite, and you have the perfect taste of summer!

## **Fruits & Vegetables**

---

**Avocados:** Peruvian fruit continues to come under pressure as shippers are looking to clean up excess inventory. Programed fruit remains steady. Due to the increase in harvest last week, California and Mexico's pricing has peaked and is starting to come off as shippers are carrying excess volume. California is peaking on 48s and larger, and Mexico on size 60s and smaller, creating an overall good size balance.

**Bananas:** Overall quality of conventional bananas is good. Plenty of volume available.

**Pineapples:** Overall industry volume is down. Our volume on large sizes will continue to be tight for the next few weeks. Volumes of 7s/8s will be plentiful during this same timeframe. Quality is high and the taste profile is wonderful.

**Grapes:** Limited volume on Magenta's available this week and Scarlet Royals available early next week.

## **Berries**

---

**Blueberries:** British Columbia large volume continues to be delayed due to cold weather and rain. Overall, the Pacific Northwest will see increasing volumes for the next few weeks. New Jersey will continue with low volumes. Baja will see low volumes though the summer, until the fall when volume increases again. Mexico and Peru seasons will start in the next few weeks with light volumes.

**Blackberries:** Supply is expected to ramp up week over week as late season varieties are coming into peak production. Given that we will be producing in most of our USA regions, we expect to have high supply in August. North Carolina will be the only region expected to descend in volume in the coming weeks due to challenging weather.

**Raspberries:** Low point of the season continues for an additional week. Looking ahead, we expect volume to increase week over week. California will drive the initial increase until Mexico begins to ramp up in September.

**Strawberries:** **ESCALATED** Cool temperatures continue to slow down fruit maturity. As a result, volumes are lower than previously expected. We predict volumes will start to decline moving forward. The overall quality is good, with flavor and firmness holding well.

## **California / Arizona Citrus**

---

**Valencias:** The valencia market is hot and inventory is down. USDA farm to family program is also taking the majority of the valencias. Fruit is mostly fancy grade, peaking 88/72.

**Lemons:** California lemons are recovering as imports begin to arrive (Chilean/Argentine). Quality has been great and the fruit is nice.

**Limes:** **EXTREME** Limes are in transition from Vera Cruz to Tobasco which is affecting the supply and sizing of limes being brought to market. We are also seeing quality issues from stylar to general skin breakdown. Currently, the lime regions are being impacted by drought, but with the forecasted rain below this will bring much needed growth to the new crop, and we should see sizing firm up over the next two weeks. The downside is we will see harvest delays over the next several days causing the already short markets to worsen. We expect very active markets for the next several weeks, pro-rates, and substitutions on sizing may be necessary until conditions stabilize.

**Grapefruit:** Starr Ruby grapefruit is available; the volume is limited with a hot market. Big fruit has been a struggle. The USDA program is also pulling grapefruit, this will definitely keep the market extremely limited and pricing above historical averages. The fruit is amazing and supply will continue to go up. The fruit is running very clean with a very limited amount of choice fruit.

### **West Coast Lettuce**

---

**Butter:** Production volumes are on budget this week. Overall demand is steady, while markets remain flat.

**Green Leaf:** Production volumes are close to budget for the week. Blocks that are being harvested are nice with good texture, size, and weight. Demand has picked up in some areas and markets are stable.

**Red Leaf:** Good supply and quality.

**Iceberg Lettuce:** Supply is slightly above budget. Quality continues to be strong as well as weight, color, and solidity. The market remains steady to slightly lower due to a small decrease in demand. The forecast is for prices to stay at current levels.

**Romaine & Romaine Hearts: (Romaine Hearts ESCALATED)** Romaine and romaine heart production supply remains below normal budget volumes. Industry supply is off to a degree as well. We expect reduced supply for at least the next few weeks. Markets are forecasted to maintain at elevated levels. Blocks are exhibiting good color, texture, and uniform sizing overall and we expect marginal fringe burn.

### **Eastern and Western Vegetables**

---

**Green Bell Pepper: WATCH LIST** Volume remains steady but expect this to decrease over the next several days due to Tropical Storm Isaias. We could see quality and supply issues due to the excessive rain and wind which this storm brought to the eastern seaboard. FOB prices are mixed this week as we are seeing harvest GAPS between blocks. California central coast peppers are about 10 days out. Product quality in the west is very nice.

**Red Bell Pepper:** Red bell market is stable this week with good volume out of the Central Valley and Intercoastal Valley. Quality is very nice. This will help supply the demand as volume crossing through Texas remains lighter than expected. Canadian deals are stressed due to viral issues, and lack of labor as a result of COVID restrictions. Volume will improve on Suntans in the east.

**Yellow Pepper: ESCALATED** Yellow bell market is up, and supply is extremely short this week as we see significant shortfalls on supply out of Central Mexico combined with very light numbers out of Baja. Canadian deals are ramping up and quality is very nice in all regions. Domestic numbers remain light.

**Mini Sweet Pepper: WATCH LIST** Overall volume is down and markets are tight due to labor conditions in Canada. Mexican volume is lighter than normal due to excessive heat and drought issues.

**Mixed Chili Pepper: WATCH LIST** Supply has firmed up and demand remains good causing prices to rise this week across the entire category. Texas remains light on tomatillo and anaheim, poblano, jalapeno and caribe are improving. East coast supply is limited in Michigan and tomatillo quality is marginal mostly due to rain.

**Eggplant: ESCALATED** Quality is fair out and limited out of Michigan and California. Demand is moderate.

**Cucumbers:** **WATCH LIST** Cucumber demand remains the same, and FOB prices are up this week. Quality is good in the west crossing through Otay Mesa. Volume and quality will be mixed in South Texas crossing through McAllen. East coast volume is expected to be down this week due to field quality resulting from rain and wind damage by Tropical Storm Isaias

**English Cucumbers:** Volume has declined, and markets remain firm. Canadian volume available.

**Green Beans:** **WATCH LIST** We continue to see this market ease back as new fields are being harvested out of Virginia. We are still seeing some residual market increases based on demand but expect this market to improve daily. Overall quality is fair and prices for hand-picked beans in the west very active.

**Zucchini/ Yellow Squash:** **WATCH LIST (North Carolina, Michigan, and California)** Soft squash supply in the east will be lighter this week due to rain and wind damage from Tropical Storm Isaias. Quality and volume will improve in the west this week. FOB prices are higher this week.

## Herbs

---

Fresh herbs continue to be steady despite the high temps that we have been having off and on during the month of July. **Oregano** and **Marjoram** continue to be affected due to flowering but we are trimming best we can before we ship. **Lemon Grass** will be short in supply and increased in price for at least the next 6 to 8 weeks. The heat wave in Northern California has caused this shortage in supply. **Opal Basil** and **Savory** have been affected by the heat as well.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Good	USA
Basil	Steady	Good	USA
Opal Basil	Steady	Good	USA
Thai Basil	Steady	Steady	USA
Bay Leaves	Steady	Good	USA
Chervil	Steady	Good	USA
Chives	Intermittent	Good	MEXICO
Cilantro	Steady	Good	USA
Dill	Steady	Good	USA
Epazote	Steady	Good	MEXICO
Lemongrass	Tight	Good	USA
Marjoram	Flowering	Steady	MEXICO
Mint	Great	Very Good	USA
Oregano	Flowering	Steady	MEXICO
Italian Parsley	Steady	Good	USA

Rosemary	Steady	Very Good	USA
Sage	Steady	Good	USA
Savory	Steady	Good	USA
Sorrel	Steady	Good	USA
Tarragon	Steady	Very Good	USA
Thyme	Steady	Good	MEXICO
Lemon Thyme	Steady	Good	USA
Lavender	Steady	Good	USA
Lime Leaves	Steady	Good	USA

## Melons

---

**Cantaloupe:** All growers in the California westside region intentionally scaled back production by at least 20% in anticipation of a decrease in demand due to COVID-19. Challenges remain ahead of us as some growers have already contended with labor shortages which could impact future production causing an unintentional shortage. Current cantaloupe sizing has been primarily 9/12s but some growers are still contending with mostly jumbo fruit (6J/9J). Quality remains at optimum levels which is expected this time of year. Overall, fruit has been solid with good color and consistent brix levels in the 12-15% range with an excellent flavor profile.

**Honeydew:** Honeydew supply is sporadic with some growers currently gapping while a few are in good production. There has been a nice mix of sizing being produced with 5/6/8s being plentiful. The USDA box program, for the most part, has avoided honeydews due to the higher per each cost. Quality has been very good with some of the best eating honeydews of the year being grown during this timeframe.

**Watermelon:** **WATCH LIST** Watermelon prices are stronger this week, there are several harvest delays due to rain in the Midwest. Missouri has seen fair supply and spotty availability out of South Carolina. Promotable volume expected over the next 2 weeks barring any further rain delays.

## Mixed Vegetables

---

**Artichokes:** We expect lighter volume in the month of August. Prices are higher. Quality is good.

**Arugula:** Supply and quality are good.

**Asparagus:** **Mexico:** Low production, fair quality, recent weather is affecting production. **Peru:** Volume is steady, good quality.

**Bok Choy:** Supply is expected to be at budgeted volumes this week.

**Broccoli / Broccoli Florets:** Good supply. Quality is very good.

**Brussels Sprouts:** Total supply is on the rise and this is a good time to promote Brussels Sprouts. Quality is good and some elongated seed core is still noted.

**Carrots (Value Added): EXTREME** Many packs sizes, especially the sizes that are hand packed, are in very short supply due to the social distancing regulations from the Coronavirus. Quality remains good.

**Cauliflower:** We continue to see excellent volume and quality.

**Celery:** Fairly light supply available in the industry. Demand is good and the market is steady this week.

**Corn:** We are now seeing good supply out of Indiana and Illinois. In the west, we continue to see increasing volume out of the Central Valley. Decent numbers are available this week out of the Carolinas. Overall demand is up this week.

**Cilantro:** Supply is expected to be plentiful this week.

**Fennel:** We will be well below budget on fennel this week.

**Garlic: EXTREME** In the last few weeks, we have made the transition to the 2020 California crop. Garlic is still a little on the fresh side, but we are managing the situation. On 7/21, the harvest of the main variety for late California garlic is a little above average but looks nice. At this time, there is still a long way to go with the harvest. Expect harvest of the 2020 crop to finish sometime in mid-September. For non-domestic product, specifically China, the market continues to be volatile. This is mainly concerning whole bulb garlic to be sold on the fresh market, Chinese supplies have somewhat normalized, and the whole bulb demand has lessened some from the dramatic highs in March, April, and May (attributed to COVID). There is still somewhat of a void of Chinese peeled product and the market continues to be abnormally high. The peeled market may settle in the coming months as more California supply, and Chinese product, becomes available. As more restaurants open back up, and people continue to want garlic, we foresee demand remaining high for peeled product.

**Ginger: EXTREME** Ginger remains very volatile also due to very inconsistent supply and market is higher. Supply to remain tight for the foreseeable future.

**Green Cabbage:** Supply is slightly below budgeted volume and we anticipate normal volume by next week.

**Green Onions:** Supply and quality are good.

**JICAMA:** Storage product is available; expect to see blemishing as it is storage fruit. Supply stable.

**Kale (Green):** Bunched kale supply is expected to be plentiful for the next few weeks. Quality is good.

**Mushrooms: WATCH LIST** Mushrooms continue to be active as shippers are still planting lighter due to the uncertainty of demand. Quality remains good.

**Napa:** Supply is expected to be plentiful this week.

**Parsley (Curly, Italian):** Bunched Parsley supply is expected to be plentiful again this week. Quality is good.

**Rapini:** We will have good supply again this week. Quality remains strong overall and we expect to have good supply for the next few weeks.

**Red Cabbage:** Supply and quality are good this week.

**Snow Peas:** **Guatemala:** Steady Volume, low demand quality is Good/Fair. **Peru:** Minimal volume, Good quality, low demand. Expecting volumes to increase early Sept.

**Sugar Snap Peas:** **Guatemala:** Steady Volume, low demand quality is Good/Fair. **Peru:** Minimal volume, Good quality, low demand. Expecting volumes to increase early Sept.

**Spinach (Bunched):** Supply and quality is good.

**Spinach (Baby):** Supply and quality is good.

**Spring Mix:** Supply and quality is good.

**Sweet Potatoes and Yams:** Storage crop is winding down as the next harvest approaches. Demand has been pretty high this summer with the addition of the USDA program and many including sweet potatoes in their produce boxes. We should see demand remain steady as the program is extended, as well as the hopes that foodservice continues to reopen across the country.

#### **Onions:**

The market is beginning to experience some weakness to FOB pricing on all colors and sizes as new crop in Idaho, Oregon, Washington continue to ramp up. Additionally, California is still shipping and working to clean up and finish shipping their remaining onions for the season. New Mexico is winding down as well, and appears to be finishing a little earlier than normal this season as they should cease shipments by the middle of next week. We are anticipating the market will continue to decrease in small ways until it finds its footing. This is not uncharacteristic of harvest, and we usually have a good sense of the quality and size of the crop during the next eight weeks or so during harvest. Demand remains erratic and unpredictable given the uncertainty of more COVID shutdowns looming around the country. Depending on what takes place regarding school openings, as well as in-restaurant dining will largely determine what demand will be from now through the end of the calendar year. Trucks have remained tight, and rates have remained elevated in all regions. The USDA Box program continues to put pressure on consumer lines to keep up with demand. However, bulk movement on small size onions appears to have dropped off some.

#### **Potatoes:**

Supply is improving as more growers begin to ship new crop (Norkotahs) fresh out of the field, and better than expected Burbank storage crop inventories are still around. We are beginning to see FOB prices fall, which is typical for this time of year with harvest ramping up. Additionally, we are seeing an increase in new crop Washington Norkotah volume, and Nebraska has begun shipping new crop potatoes as well. Early reports in Idaho are that the first Norkotahs coming off are heavier to a smaller size profile, and quality appears to be very good. Acreage throughout the state is down approximately 6-7%, and poor seed potatoes resulting from last season's hard freeze have growers optimistic regarding FOBs this season. Additionally, processors have seen an increase in movement during the Pandemic and are making strong purchasing efforts on additional raw product. The USDA Box program continues to put pressure on consumer lines to keep up with demand. Depending on what takes place regarding school openings, as well as in-restaurant dining will largely determine what demand will be from now until the end of the calendar year. Trucks have remained tight, and rates have remained elevated in all shipping regions.

## **TOMATOES**

---

### **East Coast**

- **Rounds: WATCH LIST** Demand remains very strong and supply will be light this week out of Alabama, Eastern Tennessee and North Carolina keeping markets firm this week. We are seeing rain delays throughout the east as growers clean up fields after Tropical Storm Isaias went through the region causing some local floods in wind damage. We expect firm markets for the next 7 to 10 days. California markets firmed up this week, higher demand and lighter supply are keeping the west coast Mature Green Program firm. Quality out of California is marginal due to the heat.
- **Romas: WATCH LIST** Demand rains flat in the east but expected to firm as round volume declines due to rain delays. Growers are cleaning up fields after Tropical Storm Isaias went through the region causing some local floods and wind damage. We feel the markets will firm up for the next 7 to 10 days. California volume remains fair and quality is hit and miss.
- **Grapes: WATCH LIST** East coast grape supply is finally improving, and pricing has started to ease back. We are still seeing some quality issues and we could see this turn as many growers are evaluating fields after Isaias hit the east coast with rain and wind this week.
- **Cherries:** Cherry production has improved out of Tennessee and Virginia. Quality is very nice. FOB prices are down this week.
- **Organic Tomatoes:** Markets mixed this week and quality is fair; limited supply continues.

### **Mexico**

- **Rounds: WATCH LIST** Markets are mixed this week due to an uptick in demand, from the east, for new crop (Mexican vine ripe tomatoes). Volume crossing through Baja is down this week due to some quality issues, field transitions and virus affecting quality. We should see numbers improve out of Central Mexico this week while Nogales will continue through the summer with limited crossings. We continue to see delays due to the USDA inspections, required by the new suspension agreement, causing rejections and delays at the border. FOB prices are higher this week at all border crossings
- **Romas: WATCH LIST Rounds: WATCH LIST** Markets are mixed this week due to an uptick in demand, from the east, for new crop (Mexican vine ripe tomatoes). Volume crossing through Baja is down this week due to some quality issues, field transitions and virus affecting quality. We should see numbers improve out of Central Mexico this week while Nogales will continue through the summer with limited crossings. We continue to see delays due to the USDA inspections, required by the new suspension agreement, causing rejections and delays at the border. FOB prices are higher this week at all border crossings
- **Grapes: WATCH LIST** Grape volume is easing back out of South Texas and quality will improve daily and Otay crossings remain steady. FOB prices remain mixed this week as we are seeing more demand for Mexican tomatoes in the east.
- **Cherries:** There is little demand for cherry tomatoes due to the lack of retail demand. FOB prices remain mixed this week.

## **APPLES & PEARS**

---

**Apples:** There is good supply on new crop fruit out of all major domestic growing areas. The Granny Smith market for foodservice will remain tight due to a shift in sizes; there is lighter than normal crop on 100s. Quality is very nice across all varieties.

**Asian Pears:** Asian pear supply is available. Chilean & Argentine Bartlett Pears in LA.

## **STONE FRUIT**

---

**Apricots:** Tight supply out of California.

**Cherries:** New crop cherries are available out of California.

**Peaches:** Good supply and quality available out of California, Georgia, and South Carolina.

**Plums and Nectarines:** Good supply and quality available out of California.