

MARKET TRENDS

WEEK ENDING JUNE 14, 2019



PERFORMANCE
FOODSERVICE



Produce

Market Overview

Celery is still in a very EXTREME situation. Smaller-sized lemons are also EXTREME. Strawberries are improving quickly.

WATCH LIST

- Sweet Potatoes and Yams
- Iceberg

Apples & Pears

Demand is strong for Golden Delicious and Granny Smith apples; 125- and 138-count storage supplies are limited. Washington Fuji, Gala, Granny Smith, and Red Delicious Apples are available. Braeburn and Honeycrisp volume has been depleted. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix. The market is unchanged; supplies are sufficient. D'Anjou Pears are available, as well as Bosc stocks. Sugar levels range from 12 to 14 Brix. California Bartletts will hit the market in mid-July.

Artichokes

Supply industry-wide is fair. Demand is fair and prices are steady to higher.

Arugula

Supply and quality are good.

Asparagus

The market is low; supplies are ample in both regions. Mexican quality is best: tips are tight, stalks are firm, and flavor is pleasantly grassy.

Avocados

ESCALATED – Industry volumes are steady, and pricing continues to remain strong; we expect a stable market for the month of June. California volume has increased--with shippers chasing good quality fruit for retail programs--while Mexico nears the end of the crop with more grade 2s.

Bananas

Markets remain steady with consistent production and supply. Fruit quality is not an issue at this time.

Beans

EAST: Heat has pushed GA's crop ahead of schedule, which means things will wind down sooner than expected. However, Production has begun in NC & VA, so no gap in supply is expected. FOBs are slightly up with good quality available from new crop. GA's end of crop has been seeing some trouble spots.

WEST: We're coming into a period where there will be beans from a number of regions out west. Promotable supplies are not quite available yet, but there is enough to go around. FOBs are steady to slightly up with fair to good quality available.

MARKET ALERT

- Avocados - ESCALATED
- Brussel Sprouts - EXTREME
- Cabbage (Red) – ESCALATED
- Celery – EXTREME
- Lemons (small sizes) -EXTREME



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Berries:

Blackberries

Prices are high. The Mexican season is nearly over. California production was delayed by rain but is finally getting started. Quality is very good: berries are deeply colored, juicy, and sweet. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is weak; stocks are ample. Fruit is available in California, Central Florida, and Georgia. Quality is very good: fruit is plump and juicy. Sugar levels range from 12 to 16 Brix.

Raspberries

The market is starting to ease. The Mexican season is nearly over; California supplies are increasing now that weather has improved. Quality is very good: berries are plump and juicy with sweet flavor. Sugar levels range from 13 to 14 Brix.

Strawberries

Prices are easing. Supplies remain available in Santa Maria, but the bulk of MFC orders will be shipped out of the Salinas/Watsonville region now that volume has increased, and quality is improving.

Bok Choy

50# are in short supply and prices are up.

Broccoli

Prices have eased due to increased supplies. Quality is very good despite several weeks of inclement weather: mildew and yellow discoloration are occasional problems being culled in the field.



Brussels Sprouts

EXTREME: Very light availability. We are seeing EXTREME shortages in supply and the quality from Mexico is extremely challenging.

Cantaloupe

We are going on the California and Arizona Desert regions with descent volumes on the 12's and larger, light volumes on the 15's. The overall quality is very nice with good sugars and nice clean net. The brix has been 13-14 so fruit is eating well, and internal color is excellent with a tight cavity. The market is fairly strong due to cooler temperatures and volumes not coming off at a rapid rate. Weather is supposed to warm up next week and should see some better volumes.

Carrots

Supply and quality on carrots is good. Supply is now available in Georgia as well.

Cauliflower

Prices have eased. Despite recent inclement weather, stocks have increased. Quality is very good: slight discoloration, ricey texture, and uneven growth are occasional problems being culled in the field.

Celery

ESCALATED - Expect elevated markets and tight supplies for several weeks. Recent rain has caused quality concerns.

Cilantro

Supply is good and quality is fair.

Corn

Markets are down with good supply available on yellow, white and bi color out of Florida and the desert.

Cucumbers

EAST: GA's numbers have been good but yield and quality are starting to deteriorate due to heat and rain. New growing areas will begin to fire up very soon with eastern NC and NJ starting this week. FOBs are up as quality supply things slightly.

WEST: Mainland MX will continue for another 2-3 weeks but quality is declining the form of the fruit's shelf life being quite short. Fortunately, Otay is firing up and will increase throughout June. Quality has been strong out of Baja. FOBs are up as we skip through this quick transition.

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Eggplant

EAST: it's still a rough go for eggs. Plant City has very few available and what is available is very poor quality. sunken areas, pitting etc. Georgia has begun in a very light way with volume expected to pick up in the next 10-14 days. FOBs are high, but steady. Look for this to change as Georgia picks up volume.

WEST: Very similar to the east, the west is also working through a transition period. Mainland MX is still going, but quality is very poor, and volumes are light. The CA desert has been off to a slow start with previous cooler temps, but looking at the forecast, things should improve as eggs thrive in heat and that's exactly what is in store. FOBs remain high, but steady. Look for this to change as more volume picks up out west.

English Cucumbers

There is a steady supply available from Florida, Mexico, and Canada.

Fennel

Supply on fennel will be short for the next few weeks due to frost damage and the Yuma season finishing with light supply. We will continue to see a majority of smaller fennel this week - 18s and 24s will remain limited.

Garlic

Supply is firming up and markets are active due to trade tariffs being imposed on products from China.

Ginger

Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Peru and Thailand.

Grapes

We have been struggling to get going out of Mexico and Coachella, but things are finally starting to get better as crossings have increased and the pipeline has started to get fuller, and prices are finally starting to ease and will continue to do so through the weekend and by next week should have plenty of fruit. The Mexico fruit has been fighting sugar, but weather has helped to bring it on. The overall quality of the fruit out of both regions is very clean, firm, and good color. The sugars will continue to get better in the next week to 10 days. The expected volume out of Mexico is 22 million compared to last year's crop at 14 million and they are about 2-weeks later than normal so we for sure will not have a gap when we transition to the Central valley around the 4th of July.

Green Cabbage

Supply is fair and quality is good.

Red Cabbage

ESCALATED Supply continues to be light.

Green Onions

There is good supply and excellent quality from Mexico. The market is steady and will continue to be a bit sluggish, due to good volume.

Honeydew

Market is a bit softer than the Cantaloupe Market as we are harvesting in Mexico, Arizona and the Desert region of California. There are good supplies of 5's and 6's lighter supplies of the 8's. The overall quality out of all regions has been good with a clean and green to cream cast. The internal color and sugars look good as a well as a nice cavity. We are expecting to see good quality going forward through all these regions barring any major weather.

Jicama

Steady supply crossing through Texas.

Kale (green)

Supply and quality are fair.



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Lemons

We are still picking some fruit out of Dist. 1 (Central Valley) and have started to pick Dist. 2 (Coastal Regions) fruit, just primarily size picking to relieve the trees of some stress. We are peaking on the big sizes and 165's and smaller are very limited and market much stronger and will continue to see this heading into the summer due to all the rains, fruit has been growing and peaking on 95's, 115's. The overall color is excellent as well as juice content. The moisture has also been creating spores in the fields as well and we will hope that it is not too extensive on the clear rot, but it is inevitable, and we are doing all we can to help slow the spores down in the field and in the packinghouse.

Lettuce:

Butter

Supply is good and quality is fair.

Green Leaf

Supply is slightly above normal. Quality is fair as we continue to see some occasional fringe burn. Demand is good.

Red Leaf

Supply is good, quality is fair.

Iceberg Lettuce

WATCH LIST Supply continues to be behind schedule due to cooler weather, but quality is good. The market last week started to get a little higher towards the end of the week, and this trend will continue. Anticipate higher prices due to lighter volume.

Romaine

Supply is slightly above normal. Quality issues such as mildew, fringe burn, and intern burn are still lingering.

Romaine Hearts

Supply for the week is above normal and will continue to be for the next couple of weeks. More rain is expected, and some quality issues may arise. Quality issues such as mildew, fringe burn, and intern burn are still lingering.

Limes

Prices have fallen; stocks are abundant with the exception of 110-count sizes, which are limited. Quality is very good: scarring and styler end rot are minor issues.

Napa

Quality and supply are fair.

Onions

Texas, for all intent and purposes is finished as is the Imperial Valley. New Mexico is up and running but not all the sheds are in production yet, that should take about another 3-5 days. We had a very good season in So Cal and it looks like New Mexico will be a good one as well. The yellow market is pretty good right now and should hold its value for a while. Most of the Mexican onion crop is not crossing the border, this is helping the US market maintain its strength.

Oranges

We are still running navels, quality is a bit rough due to nearing the end of the season. You will see some soft fruit with puff and crease, also some clear rot due to all the moisture this season. We have also started some Valencia's and will continue through the summer, the overall crop volume is of normal size and peaking on 88's, 113's. The overall quality of the Valencia's looks good now but fruit will have a tinge of green with good internal juice and sugars are 12-13 so eating good, and keep in mind they are a Valencia that has been on the tree for about 15 months.

Parsley (Curly, Italian)

Parsley has started to lighten up industry-wide this week. Supply and quality are both fair to good.

Green Bell Pepper

EAST: There is plenty of pepper in Georgia with excellent quality available. However, with the recent hot and rainy weather, we will see things decline rather quickly through the end of June. Eastern NC is looking to start in two weeks with additional scattered local deals firing up shortly after. FOBs remain low for now.

WEST: Coachella continues to produce good volume with excellent quality and volume. Nogales's volume is down, and quality is declining as well. FOBs are mostly steady for now but will most likely push upwards in the next couple of weeks as Nogales wraps up.



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Jalapeños (Chiles)

EAST: There is a light but steady supply coming from Plant City. Georgia is still about 1-2 weeks away. FOBs are steady with good quality available.

WEST: We have 4 regions supplying Chiles right now (Sonora, Sinaloa, Baja & the CA Desert). There is good volume available. FOBs are steady to moving down on most. Some varieties have firmer pricing due to quality concerns, which are expected to last through June due to heat.

Red & Yellow Bell Pepper

EAST: Very limited volume is importing from Honduras. GA red may not mature fully due to the weather, so expect things to remain tight out east. FOBs are up slightly with fair to good quality available.

WEST: MX has reasonably good availability, but with the lighter supply in the east, demand is up. FOBs are up. Quality is mostly good.

Pineapple

Prices are stable; stocks are adequate. Quality is very good: fruit is juicy with tangy, sweet flavor. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

We continue to see this carton market inch its way up a little at a time. Idaho has seen market strength in 80cts and larger and that should continue through this month.

Radishes

Markets are firming up due to heavy precipitation and wind damage to fields.

Salad Blends

The market is steady; supplies are tightening. Quality is fair. Inspectors are closely monitoring finished cartons for chunks and cores to achieve the best packs.

Sugar Snap Peas

Supply is tight, quality is good, volume should be coming on next week.

Snow Peas

Fields have shut down due to the recent market pricing. Volume is extremely limited.

Spinach (Bunched)

Supply and quality are good.

Spinach (Baby)

Supply and quality are good.

Spring Mix

Prices are unchanged; stocks are sufficient. Weather has improved, aiding quality.

Sweet Potatoes and Yams

WATCH LIST The sweet potato market continues to be tight after many growers were affected by Hurricane Florence in North Carolina last September. Increasing demand and heavy rains in Mississippi Louisiana, Arkansas and Alabama also created challenges for the other major growing regions but luckily, quality and size is still good. We will continue to see the price of sweet potatoes rise month by month over the summer until we get to next seasons harvest.

Yellow Squash/Zucchini

EAST: Supply is down as GA is past their peak picks. Quality from this area is subpar with heavy scuffing. We are approaching the time of year where supply is extremely fragmented all over the east. 5 states have already started in addition to GA, with more coming on board in the upcoming weeks. FOBs are up to account for the light supply and fair quality.

WEST: The better-quality squash is coming from the CA region where warm weather will bring on the crop in the next few days. Until then, there is limited supply available for good quality fruit. FOBs are up.



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TOMATOES

EAST **Rounds**

This will most likely be the last week of picks from Ruskin/ Palmetto. Mixes of rain and heat are resulting in subpar quality. If purchasing from this area, be aware of what to expect upon arrival. South Carolina is starting up with Quincy/South Georgia still a couple weeks out. FOBs are up as we cling to our South Carolina crop to carry the demand of the east. No flushes are expected anytime soon. Early reports from the fields in SC are that quality is very nice, but with rain in the forecast we may see this quickly change.

Romas

Availability will be very light in the east for the next 4 weeks or so. Palmetto is wrapped up and Quincy's volume is extremely light. Things will be tight until scattered local deals fire up around the 4th of July. Romas are in the hands of few, putting big upward pressure on FOBs. Quality for what is available is mostly good, but there are still a few lingering lots of tired old crop.

Grapes

Grape numbers in Florida are very weak, as the heat and rain have really taken a toll on the late picks. Quality is very mixed with very low pack out yields. Buyer beware of the "deal." Meanwhile both South Carolina and Quincy have begun to harvest. Numbers are expected to be low from the initial crops, but quality is improved. Thus leaving us with a very split market for grapes. Again, beware of the cheap price and expect a lower tier quality. Better quality demands a higher price point.

Cherries

Yields have been up and down over the weeks, but similar to grapes, yields are a little light through the transition. FOBs are moving up with good quality available.

WEST/MEXICO **Rounds**

The west is mostly a vine ripe program with very little mature greens available from SoCal.. Mainland MX's volume and quality continue to decline, putting pressure on new crop to perform with their limited volume. New crop eastern MX & Baja still have lower volumes and are leaning heavier on big fruit sizes. All this being said, FOBs are moving upwards. Quality is split with poor to fair from Mainland, and good to excellent from eastern regions.

Romas

Mainland's numbers are deteriorating quickly with Eastern MX & Baja not quite full steam. Thus, creating a pocket of tight supplies. FOBs are up significantly. Quality from old crop is poor while new crop is good.

Grapes/Cherries

Western demand is looking to Baja for grapes as Mainland and Nogales are just about done. Quality is much better on new crops with FOBs about steady week over week.

Tree Fruit

California nectarines and peaches are now on the market. Plums will become available next week. Quality is very good: sugar levels range from 10 to 11, but will increase as the seasons progress.

Watermelons

The market is low. Volume is high in California, Florida, Georgia, and Texas; the Mexican season is winding down. Quality is very good: fruit is juicy and bright red. Sugar levels are rising.

