



WEATHER UPDATE

Salinas— Sunny to partly cloudy next week. Highs in the 70s and lows in the 50s. **Oxnard**— Mostly sunny next week with highs in the 70s and lows in the 60s. **Mexico (Culiacan)**— Sunny to partly cloudy next week with chances of thunderstorms Monday. Highs in the 100s and lows in the 70s. **Florida, Southern**— Cloudy with chances of scattered thunderstorms throughout the whole week. Highs in the 90s and lows in the 70s. **Idaho**— Sunny to partly cloudy next week. Highs in the upper 80s and lows in the 50s.

TRANSPORTATION

The National Diesel Average has been recorded at \$3.043 down \$0.027 a gal from last week and down \$0.20 gal from last year. NPC continues to monitor and track diesel fuel averages by state as well as reported truckload freight rates on a weekly basis. **Transportation continues to work through its most significant structural changes in years in regards to new laws and regulations stressing available truck volume and controlling drivers. Trucks are in good supply in most of the country, however there is a slight shortage in South Carolina.**

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MARKET ALERT

- AVOCADOS
- BLACKBERRIES
- BELL PEPPERS— RED & YELLOW
- CELERY
- GREEN BEANS
- GREEN LEAF
- ICEBERG LETTUCE
- ONIONS
- PARSLEY (Curly, Italian)
- RED CABBAGE
- ROMAINE LETTUCE/ HEARTS
- SNOW PEAS
- SUGAR SNAP PEAS
- STRAWBERRIES
- SWEET POTATOES

MARKET OUTLOOK



Apples



QUALITY  SUPPLY 

As we look into the Summer Months (June/July/August) - it appears Washington is in pretty good shape. Golds variety will be the only variety where we will be coming right to the end with new crop just starting so it will be tight, especially with small sizes. Gr Smiths, no problem with supply throughout the summer but.... like golds - small sizes (125,138cts) will be a challenge. Fruit size -peaking on 72/80/88cts. Reds/Galas/Fujis, good supplies throughout the summer. Smaller sizes are not as plentiful as larger sizes, but we will have them for our customers. Honeycrisp, we should be able to get through the first week of August - maybe 2-3-week gap.

Asparagus



QUALITY  SUPPLY 

The markets out East remain steady. But markets out West have jumped due to less domestic supply and more demand. Seeing steady volume on standard size, but larger sizes remain limited. Quality is dependent on growing region. Expect good volume for the next few weeks.

Avocados



QUALITY  SUPPLY 

Extreme Alert- Market in most sizes staying the same as last week. Volume hasn't improved and supply is **very limited**. *Flor Loca* has been released but not yet harvested. It is expected to be ready this coming week, but we will see volumes and prices relieve after 4th of July. Quality is expected to be very good although the first weeks we will need to accommodate to this crop oil content, outside color might not give us a full accurate ripening stage.

Bananas



QUALITY  SUPPLY 

The market is steady and supplies are meeting demand. Consistent production with good volume. Quality is being reported as good to very good!

Berries



QUALITY  SUPPLY 

ALERT- Blackberries continue to dwindle in Mexico as they get closer to the end of their season. The few farmers in the Highlands will continue to go through July. CA is slowly starting this week. Seeing a significant drop in yields due to the previous rain & high temps over the last 4 weeks. Expect to see shortages in supplies & rising prices.

Blueberries in GA are mostly done. A few shippers may continue but most have finished. Due to heat-related issues, many farms in NC are going day-to-day. Oregon & British Columbia are starting in the next 10 days. MI is about 3 weeks away. AL & TX continue be in production. The Pacific NW is weeks behind. Prices will remain high & product is still very short in supply.

Raspberries Good volume out of MX. Raspberries will be the least affected as they are grown under hoops & at elevations where they have not been heavily impacted by heat. Expect to see some supply pressure on raspberries due to short supplies on the blues & blackberries.

MARKET OUTLOOK

Broccoli



Broccoli supplies have improved this week. Harvest forecast was better than expected. Prices will be lower this week. Markets should be steady going into next week. Good quality is being reported this week. No shortages or pro-rates to report currently.

Brussels Sprouts



Good supplies continue this week. The demand for Brussel sprouts is not as high as previous weeks. Market has also improved with prices back to normal. Improved quality is also being reported with multiple growers. No shortages or pro-rates are been reported at this time.

Cauliflower



Cauliflower supplies are very good this week. Supplies and markets are expected to be steady for next week. Good quality is being reported by multiple growers. No Shortages or pro-rates to report currently.

Cantaloupes



Some growers in the Imperial Valley have already started to finish their Spring crop. Cantaloupes in Firebaugh will be starting today. Patterson, CA has also started with both lopes and dews. Sizing in all regions has seen a slight shift to mid to small fruit with larger melons being somewhat limited. Cantaloupes are primarily 12/15s. As volumes start to decrease next week in AZ , production in CA will be picking up as more growers get started each day. The month of July is projected to be very steady with supply so long as weather doesn't get in the way.

Carrots



Supplies are steady. Jumbo carrots seems to be short. This has pushed prices up a bit but Canada is starting so that may change. Quality is good right now and we don't expect to see any changes in the near future on that.

MARKET ALERT

Celery



Celery / Processed Celery – Supplies are improving, market is also showing signs of getting back to normal, hopefully by next week. Markets are still escalated this week. Supplies should continue to improve. Quality has also improved; better quality is being reported by growers. No shortages to report currently, growers are almost back normal yields.

Corn



As we move into the 4th of July pulls, there will be very limited volume on yellow and white corn. The market is trying to firm up so we suggest that you book orders early with some extra lead time.

MARKET OUTLOOK



Cucumbers



The cucumber supply is somewhat steady again. Georgia has some volume again. North Carolina/New Jersey are coming up with better volume & able to take care of the local demand. Good Mexican supplies are coming through the Texas Valley & San Diego with great quality. Cucumbers seem to be plentiful short term. Expect tighter supplies as Georgia growers will start wrapping their season in the next 10-15 days.

Eggplant



GA is the hub of Eastern eggplant supply this week & they're in an oversupply situation. Unfortunately, quality is just fair. We look for better quality to come out of Eastern NC as they start up today. Other local deals are expected to come online over the next 7-14 days. The Western deal has fully transitioned from the CA desert to the Central Valley where supplies have started out light due to cool weather.

Grapes



Out of Mexico & Coachella things are finally starting to get better as crossings have increased & plenty of availability across the board. Prices are finally starting to ease. Mexican fruit has been fighting sugar, but weather has helped to bring it on. Overall quality of the fruit out of both regions is very clean, firm, & good color. The sugars will continue to get better in the next week or so.



Green Beans



The green bean market is still elevated but prices have remained fairly constant for the past week. Supplies are trending back to normal now that more growing regions have started harvesting including New Jersey, North Carolina, and Virginia. The market is expected to stay high for another week or two.

Herbs



Alert- Parsley (Curly / Italian) –Parsley supplies continue to be a challenge this week. Italian (flat) parsley has improved but curly is extremely short. Quality is being reported as fair to good. Prices remain escalated this week. No shortages or pro-rates are been reported at this time. Epazote is limited due to rain the growing regions. All other herbs are steady with good supplies.

Honeydews



Some growers in the Imperial Valley have already started to finish their Spring crop. Honeydews projected to begin by this weekend in Firebaugh. Patterson, CA has also started. Sizing in all regions has seen a slight shift to mid to small fruit with larger melons being somewhat limited. Honeydews are mostly 6/8s. As volumes start to decrease next week in AZ, production in CA will be picking up as more growers get started each day. The month of July is projected to be very steady with supply so long as weather doesn't get in the way.

MARKET OUTLOOK

MARKET ALERT

QUALITY  SUPPLY 

Iceberg



Supplies will continue to be a challenge this week. Salinas did experience better weather this week. Expect to see some quality issues on the outer leaves with fringe burn due to the excessive heat from 2-weeks ago. Warmer weather causes insects to hide to keep cool. This is normal when you get warmer weather. Inform customers to inspect & wash all lettuce items before serving. No shortages to report currently, keep in mind growers are harvesting 20% less yield than normal. **Alert includes all salad blends**— expect escalated pricing.

QUALITY  SUPPLY 

Kale



The market remain steady with good supplies. Quality is only fair at best, the heat wave from last week is creating some quality issues. Markets are expected to remain steady for the next few weeks.

MARKET ALERT

QUALITY  SUPPLY 

Leaf



ALERT-Romaine Lettuce / Romaine Hearts/ Green Leaf – Supplies continue to be very limited this week due to the excessive heat from 2 weeks ago. Expect to see multiple quality issues with irregular sizing, cupping, fringe burn, twisting, & occasional internal burn. Warmer weather causes insects to hide to keep cool which is normal when you get warmer weather. Inform customers to **inspect & wash** all lettuce items before serving. No shortages to report currently. **Alert includes all salad blends & leaf fillets as well-** Expect escalated pricing this week due to whole case commodities in short supplies. There has been reports of delays at the time of loading due to production removing excessive quality issues before packing the fillets.

QUALITY  SUPPLY 

Tender Leaf



Markets remain elevated while supplies of leaf lettuces remain very limited. Most growers have limited production this week to allow upcoming fields to gain size and weight. Current blocks are producing lower yields due to small sizing and there are also reports of a small supply gap in place due to the late season rains this spring. Some of the effects of the heat wave are still visible in the form of sun scald, fringe burn and occasional internal defects.

QUALITY  SUPPLY 

Lemons & Limes



LEMONS -Supplies continue to be tighter and higher prices on smaller sizes (140s & smaller). Expect pricing to rise weekly, fobs in mid \$30s. Larger sizes remain around \$20s. but expect supplies to get tight on those sizes as well as we move more into the summer months. No quality issues have been reported.

LIMES -Supplies continue to improve weekly but remain light on larger sizes. The market is steady to slightly higher compared to last week. Rain in Mexico reduced the volume of shipments into South Texas. Quality is good with occasional issues of scarring and yellowing.





MARKET OUTLOOK

MARKET ALERT

QUALITY



SUPPLY



Onions



Extreme Alert -Pricing records are being set this week! Ten years ago, CA set record high prices at \$16, we have broken that record this week with prices between \$18-20. New Mexico's are \$2 higher in everything because of the freight advantage. For the next 2-3 weeks, expect to see high pricing & demand. Availability will increase, especially with NM getting into their direct seeded varieties & after the 4th slowdown. Expect product to be tight from mid-Aug. until Sept 1st and higher prices for the season overall.

Onions, Green



QUALITY



SUPPLY



The market remains steady with good volume. Growers are reporting good quality at this time. Expect markets to be steady for the next week.

Oranges



The market is steady and good demand. Majority of suppliers have transitioned to Valencia oranges and volumes continue to improve weekly. However, the crop is dominated by large fruit. Quality has been reported as good. Markets on both varieties are in the \$15-\$17 depending on size & grade.

QUALITY



SUPPLY



Pears



Bosc - the State should be cleaned up in the next 2 weeks. Anjou Pears - Good supplies through July. Red Anjou Pears - We should be able to make it through June - it will be close.

QUALITY



SUPPLY



MARKET ALERT

QUALITY



SUPPLY



Peppers, Bell



Alert on Colored Peppers- Georgia's peak volume is past us however expect some availability for the next 7-10 days. SC & NC continue to ramp up volume so that helps to keep up demand out East. California fruit started to move up north. Expect supplies to be hit/miss during this transition. Other local regions will start by mid-July. Expect quality & potential supply challenges on reds. The desert has experienced a wide spectrum of weather over the last 3 weeks. This includes record-breaking heat of over 117 degrees & high winds impacting the last of the red pepper crop. The yellow pepper market is tighter this week due to the heat out west earlier in the month. Expect active markets on all color peppers through the middle of July.

Peppers, Chili



QUALITY



SUPPLY



Good chili pepper supplies out of CA with good quality. Mostly medium to large size available from this region. Santa Maria has started with light supplies. Supplies expected to remain steady the next week. In the East, GA has steady volume & a good varieties this week, but will start to wind down as we move toward July.

Pineapples



QUALITY



SUPPLY



The markets are steady this week but remain trending towards smaller sizes. We are expecting to see less 5's and more 7's and 8's for the next few months. Quality is very good, climate in Costa Rica has improve which is optimal for maintain good quality.

MARKET OUTLOOK



Potatoes



QUALITY



SUPPLY



Potatoes remain steady. All growers are running Burbanks exclusively through the end of the storage season in August; There has been little size in the Burbank crop & the carton market is reflecting that. Quality is fair to good. Expect prices to slightly climb the next 8 weeks.



SWEET POTATOES-Extreme Alert The market continues to be tight after many growers were affected by Hurricane Florence in NC last September along with increasing demand & heavy rains in the south which created challenges for the other major growing regions, but luckily quality and sizing are still good. Expect to see pricing rise month by month over the summer until we get to next season's harvest.

Squash



QUALITY



SUPPLY



Georgia's volume continues to drop. There is about 10-15 more days production until the end of the season. Yellow squash yields are way down & retail product is very limited due to excessive scarring & scuffing. Zucchini is more plentiful. Local supplies has started with production from multiple regions from east to west.

Strawberries



QUALITY



SUPPLY



Many shippers are still seeing lighter supplies due to the rain and hot weather from a few weeks ago. Production is down up to 35% due to damage to green fruit and flowers during that time. Production is not expected to recover for the next few weeks. Please place your orders early to give the growers extra time to secure fruit for you. Expect late loadings and orders cuts until things settle down.

Tomatoes



QUALITY



SUPPLY



Rounds: Up in price this week. Light supplies in the East as GA still has product but quality & size have declined quickly as they wrap up next week. TN farms expect to start next week & will be joined by VA, AL, & NC shortly thereafter. The West is working through transition, leaving the inventory a little snug. Expect volume to increase as more growers come online next week. **Roma:** Supplies got snug & markets ticked up a bit as production transitions between shade houses. Demand from the East is up due to lighter supply in that region. Outlook going into July should see slightly above normal pricing due to a lighter supply. **Grape Tomatoes:** Steady production & good quality out to the west. Volume a bit lighter out East but should pick up next week.

Watermelons



QUALITY



SUPPLY



Good volumes crossing through Nogales & McAllen. New crop is also available out of the desert & South Georgia. North Carolina will jump in the middle of July. Quality is outstanding. Expect to see steady supplies & promotable volumes in July. Prices continued to divert from the average, which typically see a little uptick heading into the holiday, but not so much this year.



MARKET OUTLOOK

MARKET ALERT

Red Cabbage (Alert)- Supplies remain short on red cabbage with markets escalated this week. Most growers are reporting very low yields at the time of harvest. Quality is being reported as only fair at this time. Growers are anticipating better supplies as cooler weather is expected the next few weeks.

Snow Peas & Sugar Snap Peas (Alert)- Volumes remain limited this week. However, supplies are slowly increase & should go back to normal in the next few weeks. Quality is good. Please expect 30%-50% pro-rates.

Hass avocado sales blast record

Hass avocados started 2019 off with strong sales for three key Q1 holidays, including the Big Game, Valentine's Day and St. Patrick's Day. Valentine's Day and St. Patrick's Day are not traditionally perceived as large avocado-consumption holidays compared to the Big Game, which is known for chips and guacamole and a variety of avocado dishes. However, as consumers continue to find new usage ideas for Hass avocados, non-traditional holidays are witnessing record sales as indicated in the Hass Avocado Board's Holiday Retail Recap.

"We are excited to see holiday avocado retail sales reach new heights as consumers continue to add them to a variety of dishes," said Emiliano Escobedo, executive director of the Hass Avocado Board. "Avocados are being added to salads, sandwiches, wraps and burgers in addition to making guacamole. They are nutritious and delicious and consumers are recognizing their versatility."

The Big Game ranks among the biggest avocado weeks of the year, and 2019 didn't disappoint with avocado volume reaching 65 million units, which was a four-year high. In fact, volume has increased each year for the past four years with a 27 percent increase from 2016.

Heart health is a focus of the board's initiatives during American Heart Month (February). Many breakfast recipes were promoted to bring awareness to the heart health benefits of Hass avocados. Over 75 percent of the fat in healthy avocados is "good fat." The Dietary Guidelines for Americans recommend replacing bad fats with good fats, and good fats can help improve intake of dietary fat without raising LDL ("bad") cholesterol levels. Valentine's Day has been a highlight for avocado sales during American Heart Month, with sales trending up for three out of the past four years.

St. Patrick Day avocado sales were up across the country as the holiday saw record total U.S. dollar sales and volume at nearly \$50 million and 51 million units. In addition to nutritious avocado being added to soups, stews and smoothies, the holiday week benefited from lower prices, making volume surge and pushing dollar sales to new heights.

The Hass Avocado Board releases a holiday recap each quarter, covering avocado sales trends for the corresponding holidays and events. The reports provide the industry with up-to-date holiday insights to assist marketers and retailers with planning for next year's holiday store promotions. HAB offers these insights and detailed retail information as the only avocado organization that equips the entire industry for success, with clear and actionable data and metrics that all can use to drive their avocado business.

<http://www.producenews.com/the-produce-news-today-s-headlines/26967-hass-avocado-sales-blast-record>

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to dforsythe@nproduce.com and we will be happy to give you those current market conditions. Also look for our Spanish version that will be released on Monday and our Midweek Update released every Wednesday. Have a great week!

Keeping You Informed,



Your Dedicated NPC, LLC Staff