



THINGS YOU SHOULD KNOW:

COMMODITY ALERT:

Asparagus availability will be tight at least till the middle of the week

Offshore Honeydew and Cantaloupe still running very large sizing. Domestic melons started

Mexican and Domestic grapes started

Apples and Pears---the eastern supplies are short and Washington is in large fruit so stay ahead on the smaller sizes

Strawberry's will remain in a demand exceeds situation due to heavy Mother's Day demand



The Source

May 5, 2014

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Weather: *Tim Lynch*

On shore flow and a return of the marine layer on the west coast brings significant cooling to California through mid-week. Temperatures in the 60s near the coast to low 70s in the inland valleys following the heat of last week. Central California will also see moderate winds (20-30mph) over the next couple days in front of the next high pressure system as we begin the roller coaster between high and low pressure systems typical of spring.



Freight: *Mike McIntire*

Trucks in California will be tight this week as we deal with increased business for Mothers day. Trucks in Washington and Idaho remain steady. The national average on diesel fuel was 3.975 per gallon last week and will most likely increase slightly when prices come out later today. Crude oil continues to be near 100.00 per barrel and is now 99.12 per barrel.



Commodity Updates

APPLES/PEARS *John Tole*

New York continues to pack McIntosh, Red Delicious, Empires, and Red Rome's. The markets for all are steady to slightly higher on 100's and larger and are higher on 113's and smaller. The later New York shippers expect to pack until approximately June 10th. Washington Red Delicious continues to peak on 100's and larger while 113's and smaller are extremely short. The red market is especially strong on 113's and smaller. Washington Golden Delicious is steady and is still more evenly spread across all sizes. The demand for golden delicious has been only fair. Granny-Smith apples are fairly steady on all sizes but the market is strong. 113-size and smaller are more prevalent in the granny-Smith variety. The Washington Gala market is rising and will continue to go up until they finish in mid May or early June. Galas are peaking on 88/100's. Most Washington Fuji's shippers are peaking on 80-size and larger, but the demand for the larger sizes has been very strong. The Fuji markets are also rising as we approach the end of the season. Washington D'Anjou pears are peaking on 80/90's and are short on 110's and smaller. Expect the small D'Anjou's to remain short through the remainder of the storage season. Bosc Pears are heavy to 100/110's and have more of the smaller sizes but much of it is already committed. Red Pears are still available and heavier to half-carton 45/50's.

ASPARAGUS *Gabe Romero/Mike Pacheco*

This market continues to be strong as demand continues to exceed supply. Supplies continue to be light out of Mexico, California, and Washington. Jumbo sizing is the most difficult to come by. The availability may loosen up by the middle of the week. The quality overall is good in all the growing regions.

AVOCADO *Tim Kelley*

Mexico's supplies are lightening with limited volumes on 48's and larger, but is still the predominant supplier to the USA. We do expect Mexico's supplies drop greatly by the end of the month as their main crop finishes. Quality and flavor are very good. California growers have begun to harvest in earnest. The

Commodities at a glance...

<u>Commodity</u>	<u>Quality</u>	<u>Market</u>
Apples	Good	Steady
Asparagus	Good	Higher
Avocado (Mexican)	Good	Steady
Avocado (California)	Good	Steady
Bell Peppers (Western)	Good	Steady
Bell Pepper (Eastern)	Good	Steady
Berries: Strawberries	Fair	Higher
Berries: Raspberries	Fair	Steady
Berries: Blackberries	Fair	Higher
Berries: Blueberries	Good	Lower
Broccoli	Good	Lower
Carrots	Good	Steady
Cauliflower	Fair	Higher
Celery	Fair	Lower
Citrus: Lemons	Good	Higher
Citrus: Oranges	Good	Steady
Cucumbers (Western)	Good	Steady
Cucumbers (Eastern)	Good	Steady
Eggplant (Western)	Good	Steady
Eggplant (Eastern)	Good	Steady
Grapes, Green	Fair	Steady
Grapes, Red	Good	Steady
Green Onions	Good	Steady
Lettuce: Leaf	Fair	Steady
Lettuce: Iceberg	Fair	Lower
Melons: Cantaloupe	Good	Steady
Melons: Honeydew	Good	Steady
Onions	Good	Lower
Pears	Good	Steady
Potatoes	Fair	Higher
Squash (Western)	Good	Higher
Squash (Eastern)	Good	Steady
Stone Fruit	Excellent	Lower
Tomatoes (Western)	Good	Steady
Tomatoes (Eastern)	Good	Lower
Watermelon	Good	Steady

Commodity Updates continued

fruit is very good, with high maturity levels. Size currently peaking on 60's and 70's.

BELL PEPPERS

Western Bells: *Mike Cantu*

Green bell market is steady and is still demand exceeds on larger fruit off grade and smaller fruit is settling. Crops are currently shipping mostly from Sonora. Sizing is heavier towards med and choice fruit; larger fruit is very scarce. We are looking at some growers wrapping up or close to wrapping up in production sooner than seasonably customary. Volume indications are we are approaching the wrap up of green bells from Mexico. Southern California is has started but is mostly producing large fruit. Open field colored Red bell market is steady but high FOBS but, some ranches are experiencing some minor gapping and/ or wrapping up. Markets are steady as both Hot House and open field color bells are trying to find their spot. Quality is good in both open field and hothouse colored bells. We do however see this market continuing light for the next couple of weeks and will be in demand exceeds for the remainder of the Nogales season. Gold bells markets continue steady availability depends on growing district. Demand exceeds as Mexican production has started in earnest. We are starting to see some hot house product crossing but still light.

Eastern Bells: *Harry Sheaffer*

Green Bells jumbo and XLP are in good supply while off grades are becoming a little easier to find.

BERRIES *Jonathan Mule'*

Strawberries: Strawberry's will remain in a demand exceeds situation for the front part of this week. The affect of the warmer temperatures of last week will hurt overall quality showing sunburn and soft fruit with all arrivals. I would only pull what you will need for all your orders as the fruit will not hold up as well as you are you're used to. The forecast is calling for significant cool down starting today into the middle of this week. The long range forecast is calling for another warming trend this weekend. All shippers are in a heavy fill rate situation. Loading times will be long and orders could be moved at the last minute or pushed into the next day due to availability. The market is firm.

Raspberries: The raspberries supplies are mainly coming out of Mexico followed by Oxnard and Salinas. Supplies are seasonally winding down out of Mexico with California increasing each week. Due to the warmer temperatures last week in California, the quality and availability will be compromised through this week. We will see some quality issues with soft fruit on all arrivals. This market will remain steady.

Blackberries: Blackberry market will continue to strengthen as supplies out Mexico wind down. Local production out of California has started but supplies are light and will be most of this month. Quality is fair with few good lots being shipped.

Blueberries: Supplies are starting to improve with most shippers. Blueberries production is mainly coming out of Florida, Georgia, Mexico and California. Market is steady, but will start to weaken in the coming weeks. Quality is good depending on the lot.

BROCCOLI *Gabe Romero/Mike Pacheco*

This market is softer as the Mother's day pull is just about over. Better supplies do exist on bunched product as well as crowns. The production continues to be out of Salinas and Santa Maria. Mexico has production as well. Production should be moderate to good throughout the week.

CARROTS *Tim Kelley*

Bakersfield crop is producing good volumes of good quality carrots.

CAULIFLOWER *Gabe Romero/Mike Pacheco*

This market is gaining strength once again. Many suppliers have begun the week very light in availability with a few sold out. Issues of spotting and yellowing have slowed down considerably. Santa Maria and Salinas continue to be the main growing regions at this time. Supplies are expected to be light until the end of the week, minimum.

CELERY *Gabe Romero/Mike Pacheco*

This market is softer with many suppliers. Inventories are moderate as the Mother's day pull is all but over and inventories increase. Shippers still have seeder issues. Demand has slowed. The best availability continues to be

Commodity Updates continued

with twenty-four counts. Oxnard continues to be the main area of production on this commodity. Santa Maria has light production.

CITRUS *Tim Kelley*

Lemons: Central Valley supplies will be declining over the next 2 to 3 weeks as they near the end of their production. The Ventura crop is now in full production. Demand continues to increase for lemons is keeping the 140's and smaller very tight.

Oranges: Navels are projected to through May, but most of these late Navels will be the larger sizes and demand continues to exceed their supplies on 88's and smaller. There are limited volumes available on the Valencia oranges. There will be more shippers beginning to pack Valencia's over the next couple of weeks. We are seeing some re-greening of the fruit with the warmer weather in the growing areas. Current pack outs on Val's shows peaking on 113's and 88's.

Limes: Supplies are still light, but we are seeing more fruit coming available as demand has dropped off. Supplies still mostly the small sizes of 230's/250's/275's.

CUCUMBERS

Western Cucumber: *Mike Cantu*

Market is steady. Markets are slightly unsettled due to holiday and truck availability. Newer fields have started with good production. Weather for growing areas is expected to warm up and increase production.

Eastern Cucumbers: *Harry Sheaffer*

Expect the market to stay steady with good quality.

EGGPLANT

Western Eggplant: *Mike Cantu*

Market is expected Steady. Current supplies are adequate for demand. Quality is good. Warm weather may accelerate the wrapping up of the current crops.

Eastern Eggplant: *Harry Sheaffer*

Eggs are in better supply and quality.

GRAPES: *Amy Grolnick*

Chilean grapes are still available on both coasts. Offshore green grapes are finishing up. We have domestic grapes started in Coachella and Mexican grapes for loading in Nogales. Both

have good quality and are running mostly med/large to start.

GREEN ONIONS *Gabe Romero/Mike Pacheco*

This market has remained unchanged. Expect this pattern to be steady for the entire week. Demand is minimal. Production continues to be good out of the Mexico region. Supplies are expected to be good throughout the month of April...

LEAF LETTUCE *Gabe Romero/Mike Pacheco*

Romaine overall is steady. There is a gap in pricing with a few shippers. Green and red leaf availability is steady with most suppliers. There has been some fringe burn reported on romaine. Demand has slowed and availability should not be a problem throughout the week on all leaf items. Production predominately is coming out of Salinas and Santa Maria.

LETTUCE *Gabe Romero/Mike Pacheco*

Supplies are much better to begin the week on this commodity. This market is down. Offers are out there for bulk type orders by multiple shippers. Weights continue to be reported to be in the range of 43-46 pounds. Pinking, ribbing and discoloration has been issues reported upon arrivals. Cooler temperatures exists currently in Santa Maria as well as Salinas compared to the previous week. There may be quality issues for product that arrives early this week due to hot temperatures in the Salinas valley last week

MELONS: *Amy Grolnick*

Cantaloupe: There is still good quality on the offshore fruit coming into both coasts still mostly large fruit. Nogales has some limited availability with smaller fruit available. CA fruit is going with a better run of sizes.

Honeydew: Offshore fruit is still going strong peaking to 5ct. Nogales has good quality and smaller sized fruit available. CA fruit has started in a very light way.

ONIONS *John Tole*

Idaho/Oregon has finished packing yellows and reds for the fresh market. Washington has a couple shippers still packing both colors. The Texas market is down slightly due mostly to California. The Texas volume is light on all

Commodity Updates Continued

sizes but the jumbo & medium yellow inventories are higher. California has better numbers across the board and the size is starting to increase so expect more Colossals and fewer mediums as the week goes on. Reds are steady in Texas due to limited supplies while California is lower due to increased supplies. Whites are slightly lower in both California and Texas due to larger inventories out west and light demand. The quality has been good on all colors in both areas.

POTATOES *John Tole*

Idaho continues to struggle with size in the Burbanks. Most shippers are up slightly on 40/50's and are even higher on 60-80's. 90-count and smaller are available in good numbers along with number-two's. Most packers will flex on volume orders of the number-tuos and smaller counts. The Washington market is slightly higher on all sizes. Most shippers there are peaking on 80's and larger. Colorado is higher on 80-count and larger and steady on 90-count and smaller. Most of the Colorado shippers have limited availability on the larger counts due to strong demand. Wisconsin is higher and strong on all sizes of russets as the end of the season approaches. Western Washington still has a few Gold's left but they are nearly finished. Bakersfield, California red potatoes remain large while the gold's and whites are producing more B-size. The California markets are steady on reds and steady to lower on the gold's and whites. Southern Florida is also packing all colors and they will go into May. The Florida reds and Whites are peaking on A-size while the Gold's are heavier to B-size. The Florida A reds and gold's are steady. Arizona started packing new-crop Red potatoes and they are peaking on A's while B's are short.

SQUASH

Western Squash: *Mike Cantu*

Market is creeping up on Italian and yellow s/n. Most production is from southern Sonora and northern Sinaloa. Demand is currently outpacing supplies for now.

Eastern Squash: *Harry Sheaffer*

Squash has started in the Georgia area but most volume remains in plant city area quality is good.

STONE FRUIT *Amy Grolnick*

California stone fruit is going strong. Both yellow and white, peaches and nectarines are available with excellent quality and good sugars. Apricots are also available with good quality. Cherries are available but still limited and should remain that way for the season. Plum are started up in a light way and in the hands of very few shippers.

TOMATOES *Aaron Aliotti*

Western/Mexico: The situation in Mexico remains fairly unchanged this week as older growing areas finish up their inventories. To compete with the volume coming out of Florida, prices are at their minimums and may even create a situation where Mexico's mandated price floor is above the Florida market. Mexico remains in their seasonal decline, finishing up this week. Availability on rounds is mostly in the smaller sized fruit with larger pickings limited. Roma tomatoes are also in decline and fields are finishing up with the last of inventory carrying growers into May. Grape and Cherry tomatoes are very tight in Mexico and will remain limited until new crops get started in the next 7-10 days.

Eastern Tomatoes: Volume is continuing to increase and the market has softened slightly this week. The Palmetto-Ruskin area is in full swing helping finish the transition to Spring Crops. Heavy winds and rains through the North East may have an effect on the Quincy growing area in Northern Florida in the future, but for now weather is slowing demand. The roma market has firmed up with new fields bringing fruit to market with marginal quality seen on older fruit as shippers attempt to clean out inventories from previous fields. Grape and cherry tomatoes are consistent and price is flat with demand coming on stronger this week and may even bring about a 1 or 2 dollar increase as Mothers Day approaches and Mexico tries to increase their crossings.

VALUE ADDED *Gabe Romero/Mike Pacheco*

Supplies on lettuce are going to be strong for all the processor's needs. Cauliflower, although off escalated pricing will have light availability. Broccoli supplies are expected to be steady throughout the week. Romaine will have good supplies expected with most suppliers.

Commodity Updates Continued

WATERMELON *Mike Cantu*

Market is steady. We do foresee markets going higher soon as some growers are figuring production may lighten up as some crops are ahead of schedule due to earlier warm weather. Current Nogales crossings are steady and so is availability. Other districts have wrapped up. The spring crop will be mostly packed in bins and cartons will become lighter in supplies.