

# Market Report

5/2/22 - 5/7/22

**WEATHER:** Temperatures will be mild in Salinas as the highs will be in the 60's. No rain is in the forecast.

**EXTENDED WEATHER:** High pressure strengthens late next weekend bringing above average temps through the first half of the first week of May. A system moving into the region Thursday, May 5 cools temps back near normal under a deepening marine layer. Weak high pressure lingers behind it with seasonable temps into the second week of May.

**ARUGULA --** Quality has improved with much better available supplies, market is steady

**ASPARAGUS --** The Caborca/San Luis region has all but wrapped up its season. Obregon has started with slow production, but we should see more volume in the next week or two. The Guanajuato region should start-up in mid to late May. Peruvian production increases every week, but a truck driver strike has slowed logistics. The market is very active with the transition from Caborca to Obregon and Peru's logistical challenges.

**AVOCADO -- Alert** Once harvest resumes next week, growers will see a higher spot market and heavy field demand (shippers will need to replenish and prepare for Cinco) which will cause inflated pricing. Expect a high market until Mid-June.

**BOK CHOY --** Production is steady. Overall quality is good as well as appearance. Ongoing rain in the forecast may impact harvest times.

**BROCOLLI --**Supplies are better this week with the warmer weather and we are back in Salinas, CA. Crop showing good quality and color overall.

**BRUSSEL SPROUTS --** Sprout volume will remain light to below budget this week due to weaker yields and some lighter weights. We are noting some poorer performance on certain varieties that are softer and fluffy in texture/density along with more elongated stems. Expect sub normal fill rates on bulk 25lb packs and an advancing market.

**CARROTS --** Current demand exceeds predicted supply while lower than average yields caused by cold wet weather has limited availability. Shippers continue to struggle with labor due to COVID and not having enough workers show daily to pack carrots.

**CABBAGE --** Quality is good. Demand is good but the numbers are lower than what we were able to pull from Texas. Quality is great out of Florida.

**CAULIFLOWER --** Volumes are plentiful with some wind damage. Quality, texture, color, and sizing of this item are in a category all on its own.

**CELERY --** Much lighter supplies for us and the industry. Quality is fair at best with seeders present in every box. The market is higher in Oxnard. We are done harvesting in Mexico.

**CABBAGE --** Quality is good. Demand is good but the numbers are lower than what we were able to pull from Texas. Quality is great out of Florida.

**CILANTRO --**Supplies look to be back on budget with more volume expected to increase more by next week.

**GREEN ONIONS --** Supplies are light and quality is fair. There are no ice delays

**KALE --** Supplies are expected to be very good this week.

**LETTUCE --**Salinas has started and we look to be right on budget. Quality has been very solid to start Salinas. Weights are perfect and cosmetically it looks very good. The market has seemed to find the right selling point and the forecast is steady at current levels.

**LEAF & ROMAINE --** Production on leaf in Salinas is steady. Overall quality in the desert is good with some signs of bacteria and light fringe burn. Markets are slightly stronger with good demand. Romaine supplies are at budget. Quality is good and plants that are healthy are exhibiting dark green color. Light windburn from wind may be noticeable. Overall demand is good and steady.

**NAPPA --** Started with the second grower just this week and quality is great. Supplies this week are good; however, there is some internal burn present.

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**SPINACH** -- Good supply for current demand. Overall good quality, size, and texture.

**SPRING MIX** -- Our Spring Mix is triple-washed and ready to use, with a target blend of 70% greens and 30% reds.

### **PEPPERS/CUCUMBERS/ /SQUASH** --

**Green Peppers:** We expect up and down markets over the next several weeks due to crop loss and bloom drop resulting from damages by the freeze early last month. We should see some relief over the next week as new crop will start to become available. In Mexico, there was cooler weather last week that will slow down production but expect the season to wind down over the next several weeks. Coachella is slowly ramping up and quality out of the region is very nice. In Mexico, quality varies by region in Mexico as well as what fields are being harvested, we are seeing much better quality in newer acreage.

**Cucumbers:** Florida supply continues to ramp up over the next 10-14 days, while in the west we continue to see lighter crossing and higher demand from the east keep FOBs higher out of McAllen and Nogales.

**Squash:** Excellent supply and quality available out of Florida and Crossing through Nogales.

**SWEET POTATOES-** Availability continues to be good out of North Carolina on jumbos, #1's and #2's. The market has been relatively flat all season, but we should expect to see prices gradually start to climb as we enter the summer months.

**POTATOES** -- We have finished our Norkotah crop, and we will conclude our season with Burbank variety. It appears to be a bit of a mixed profile depending on the different growers around the state. Some are in a larger size profile, whereas some are heavier to smaller potatoes. Overall, the market continues to remain relatively 'flat' in terms of pricing this month. However, we are beginning to see the market tighten on large size count cartons throughout the state. We are seeing smaller size profiles on potatoes than we previously had, which is helping to lower the FOBs on those items. Non-size A potatoes, and #2s are more plentiful than they have been in recent months as well.

**PARSLEY** -- Supplies are expected to be off a little this week.

**ONIONS -- ALERT** -- On average, the markets rose by about 15 to 20% across the board. The expectation was that the entire market was going to go up and be on that upward swing and so it did. As for California, it's expected to start harvest the last week of April and then have marketable supplies for the first week in May. That's when Texas will be wrapping up. They had a colder than usual growing period this spring so that delayed things between 10-days to two weeks.

**APPLES--** The apple market has leveled out this week and the prices are stable on most items. I expect the prices to remain steady through April, then possibly start to push upward again in May as inventory levels drop for this storage item. The overall crop is down this year with the total crop estimated to be around 118 million cases. This will make the second crop in a row that is smaller than normal and looks to be at least 3 million cases shorter than the crop last season. Most growers feel that the crop was hurt by the extreme heat and weather conditions that we experienced during the summer months. The tightest items this week are Honeycrisp and Gala apples. The quality of the fruit has been good so far, but we will see how the fruit holds up in storage as we begin to open storage rooms later in the year. Pricing overall is running higher due to the shorter crop and overall inflation in the growing chain, including labor, picking, packing, and transporting of apples. This is shaping up to be a challenging year, but we have a good grower base who will work with us to get through these challenges.

### **TOMATOES** --

**Rounds:** The round market has eased up from last week. Florida is back in good supply on rounds. Mexico supply seems to be dwindling as they are transitioning from old fields into newer fields. However, as they are finishing up the older fields, the quality is starting to suffer. With some minor reconditioning the product is good. On the flip side, quality is very good from Florida at this time. Demand seems to be picking up slightly as warmer weather is setting in.

**Grape:** Market has plenty of supplies in both Mexico and Florida. Markets are affordable.

**Cherry:** Mexico is higher than Florida. Most of the cherries from Mexico are staying west of the Rockies. Florida has plenty of supply and decent quality.

**Roma:** Market is affordable. Florida is coming in with more supplies and Mexico has both older crops and newer crops going at the same time. There are logistical issues on the product crossing through McAllen, Texas. There is

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currently an increase in truck inspections crossing the border out of Texas. This has caused some significant delays in crossings which means product won't be as fresh by the time it reaches the cross-dock warehouses on the border.

**BLACKBERRIES** -- We are seeing great quality with very good flavor. Supplies will be good through the next week, but then we may hit somewhat of a supply gap.

**BLUEBERRIES** -- Central Mexico is producing large and decreasing volumes. Florida is on the back end of its season's peak, but Baja production is increasing toward its spring peak. Georgia started last week, and volume is expected to ramp up next week.

### **CITRUS** –

**Lemons:** Supplies of lemons are steady with good quality fruit coming from California.

**Limes:** Between the border strike interrupting supply, as well as a very volatile year for limes, and we still are seeing unprecedented conditions. As we have shared, the grower community expected improvement in supply by now, however, the new crop limes are simply not sizing up. Growers continue to cut ahead into the smaller fruit to keep the supply chain full and we hope to see some relief over the next 2-4 weeks as volume increases, and new regions start harvesting. We will continue to see challenges so please be flexible on sizes, consider scaling back on portions, removing temporarily, or even subbing to lime juice or fresh lemon where possible.

**Oranges:** The California navel season is nearing its end with growers expecting to ship through the end of May. Supplies of smaller sizes (113s and 138s) are tightening, with elevated prices expected for the remainder of the navel season.

**GRAPES**-- Weather in Chile is ideal for grapes and has been for a few weeks, which is increasing the supply imported into the U.S. Red Grape pricing continues to be fairly low with plenty of supply. Green grapes remain higher as fewer supplies have been shipped.

**KIWI FRUIT** -- California and Imported kiwi are available. California sizes mostly 36 and smaller, larger sizes are limited. Fruit is firm with some soft in box.

### **MELONS** --

**CANTALOUPE:** Production remains consistent with grower projections. However, they continue to face challenges with limited availability with ocean carriers which is not allowing them always to send their fruit to preferred destination ports. Recent sizing has been primarily 9cts and larger, with a considerable amount of jumbo fruit being packed. This trend has left 12/15cts in an extremely limited position. The cause for this has been hotter temperatures in the growing areas. Melons are coming in with some of the best exterior color of the season, and we are seeing average brix levels increasing slightly.

**HONEY DEW:** production is even shorter than the cantaloupe. Growers are harvesting mostly 5cts and larger leaving the 6/8cts in an extremely limited position. With lower overall production, the significant shift in sizing to larger fruit truly magnifies the shortage of the smaller sizes. Fortunately, incoming fruit has been very good quality with good brix levels.

**WATERMELONS** -- Supplies on seedless are starting to pick up while minis are still tight. Supplies will continue to pick up and there will be good volume in May. Our Yucatan, Mexico crop is still going in the East for another 1-2 weeks. Florida is going and Arcadia, Florida is starting as well. North Florida is 3 to 4 weeks away. Out West, Northern Mexico is picking up in volume with good quality. May will be a good month to promote seedless watermelons.

**RASPBERRIES** - Driscoll is advising they see the supply side improving over the next six (6) weeks as we head toward the spring peak. Salinas will start harvesting the tail end of this month, if not the first of May for certain.

**STRAWBERRIES** - California peak strawberry harvest season got off to a strong start and is proceeding as expected, despite less-than-optimal rainfall during the growing season. The fruit that will be arriving for National Strawberry Month, Mother's Day and Memorial Day has outstanding quality.

*Market Reprt Summarized from our Friends at Legacy Foodservice and ProMark*

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