



Fresh Directions

January 20th, 2011

An informative weekly fact sheet for the produce procurement professional.

Apples ↑ Washington continues to pack high colored reds that are peaking on 100's and smaller. Increased demand is pushing all grades of Red delicious higher but especially the lower grades. Golden's are still mostly large and continue to pack-out heavier to the Washington extra-fancy grade. Small golden remain very limited. Royal Gala's are still peaking on 100/113's and have good color while large fruit remains tight. Granny-Smiths are still large while 100's and smaller are very short. Fuji's are high in color and are peaking on 88's and larger. Small Fuji's remain very short.

Asparagus ↓ This market continues to be soft. Mexican production is getting much stronger on all sizes. Peruvian product is increasing in availability on standard and large sizes. The jumbo and extra large sizing has increased in availability.

Avocado ↔ Avocado supplies have leveled out some as growers start to catch up with current demand for fruit. During the upcoming weeks as we move into The Super Bowl event, demand is expected to keep supplies clean and some activity to the market. The California which is forecasted to be 50% lighter than last year's crop will start later and be a shorter year. Chile has such a light crop this year; they are not much of a factor.

Bell Peppers Western ↔ Mexico's supplies loading out of Nogales are steady to lighter with a wide range of quality. Demand is good. The Red bells supplies from Mexico are still good, and the Yellow bell supplies are fair.

Eastern ↑ Pepper on the east is still readily available and the market seems to be reacting to the rising pepper market in Nogales. Quality is good now but extremely cold temperatures are expected in Florida in the coming days which could affect quality and further inflate pricing. At this point it is too early to tell.

Broccoli ↑ The market continues to be active. Yuma production is down due to past extreme cold weather that has slowed the growth. Santa Maria and the San Joaquin Valley have had heavy rains the previous weeks and this hurt the crop severely. This has made this commodity very tough to purchase due to lack of availability. Pin rot, Discoloring, and heavy water damage are common defects we are currently seeing on all broccoli items. Mexico production has moderate production but this region has had issues with low temperatures and rain as well. This commodity will be tight all week with any pack including value added items.

Cauliflower ↑ The cauliflower market continues to get stronger with all suppliers. The supplies will be light to start the week. Supplies are expected to be

slightly better towards the end of the week. Twelve count sizing continues to be the most readily size available. Santa Maria and Yuma volumes have decreased due to past freezing temperatures. The overall quality is reported to be fair.

Celery ↑ This market continues to get stronger on all sizing. Large sizing is the tightest and is commanding a higher price. The gap in pricing has closed significantly among all the growers. Large sizing will be tight for the entire week. Currently, production is coming from Oxnard, Santa Maria and Yuma. The Oxnard production has significantly been reduced. The weights are fine but there are continued issues with quality. These issues include cracking at the nose, pith and bottom rot.

Citrus Lemons ↔ Fruit is sizing up due to the heavy rains in the growing areas. 140's and larger are now more available, and look for 200's to start getting less abundant. **Oranges** ↔ We are seeing the size in the orange crop starting to size up as well. The percentage of small sizes being packed is starting to drop.

Lettuce Leaf ↑ This market on romaine continues to get stronger. Supplies are light to moderate with most suppliers. Romaine Hearts are also an issue as suppliers are being made to put more heads in a carton to make weights. The freeze has hurt some suppliers more than others and it is reflected in the quality of

their romaine. Romaine continues to show some blister, epidermal peel and bottom rot. This continues to be an industry wide issue. Green and red leaf and butter is available with an increase in price as well. Issues of fringe burn and blistering is occurring as well, but not to the extent of romaine. Sclerotinia is spreading in Yuma and creating huge issues on production.

Iceberg ↑ This market continues to get stronger. Shippers are expected to have issues all this week because of past freezing temperatures. Pricing will be active throughout the week. Shippers are still seeing some epidermal peel, bottom rot, as well as blister for product being harvested. Shippers are expected to have light to moderate supplies for the rest of this week. The weights and quality will vary amongst the different shippers. Yuma production has weights ranging from 38 to 44 pounds. The sclerotinia issues in Yuma will only make production numbers smaller coupled with all the other issues.

Melons Cantaloupes ↔

Transition from Guatemalan to Honduras fruit is continuing this week and is limiting volume. Cantaloupe availability is subject to port arrivals. Sizes are switching to peak to large fruit again with small fruit limited.

Quality is good and prices up. **Honeydew**

↔ Nogales still has Mexican fruit peaking to 8's. Offshore dewes are showing a little activity with the market starting to firm up a bit due to the transition of growing areas. Sizes are peaking to large fruit again. Quality is excellent.

Onions ↔ Idaho, Oregon, & Washington are mostly steady on Colossal and jumbo yellows while the medium market remains strong. Jumbos & colossal are still the bulk of Idaho/Oregon's production. Washington is still producing mostly jumbo yellows and also remains high on mediums due mostly to export demand. The yellow quality has been

mostly good in both areas. Reds are steady to lower and the volume deals are still available. Whites are steady but strong due to lighter supplies and variable quality. The quality on reds has been good. Nevada is still packing whites, yellows, and reds and they are steady on all sizes and colors but are still relatively high on their yellows. However they are relatively cheap on reds.

Potatoes ↑ Idaho is starting this week with warmer weather so we shouldn't have a production lag like the last two weeks. The forecast for the rest of the week shows temp's in the 20's so hauling bulk shouldn't be an issue. Idaho continues to peak on smaller Burbanks and the larger counts remain limited. More shippers are packing norkotahs this week which will help increase the availability of the larger counts. The quality for both varieties has been good. Pricing is higher on both varieties and all sizes except poly due to lighter supplies. Washington Norkotahs are still peaking on 70-90's. The Washington market is also higher on all sizes this week again due to demand. Colorado is still packing larger Norkotahs and their market is also stronger. California continues to ship colored potatoes from Bakersfield and the availability is much better now that the weather has dried out. Mount Vernon, Washington continues packing excellent quality reds & golds but the gold volume is limited as they approach the end of the season. The Washington market is mostly steady on all colors. Minnesota & Wisconsin both continue to pack reds and golds and the markets for both are steady.

Tomatoes Eastern ↑ Overall the tomato market is moving upward in price on round tomatoes as well as Roma's. There is actually a shortage of "round tomatoes" in Florida as well as Mexico, and those prices are being pushed upward. Cherry and Grape Tomatoes are in good supply and are priced very reasonable.

Western ↑ Roma tomatoes continue a bit active and pricing is up from last week. There are two layer tomatoes crossing through McAllen TX currently and 25# round and Roma tomatoes. We can expect to see increased fob's as the east will be stressed from the cold, if demand picks up. Nogales is going with very low volume currently but by next week should have significantly more volume on all varieties.

