

Fresh DIRECTIONS



An informative weekly fact sheet for the produce procurement professional.

October 3, 2013

Apples ↔ New York continues packing McIntosh, Galas, Red Delicious, and Ginger Golds. All variety's are a little bigger and are peaking on 100 sizes now. Michigan continues to pack Reds, Golds, Gala's, and a few McIntosh. All varieties are average to small in size. Washington, CA Reds are still peaking on extra-fancy 88/100's but inventories are low. New-crop Red Delicious is peaking on 48-72's and the Washington extra-fancy #1 grade. Small new-crop Red Delicious are very short! Golden Delicious is peaking 80/88's and extra-fancy fruit. C.A. Granny-Smith supplies are very short. New-crop Washington Granny-Smith is priced mostly steady is producing more of the smaller sizes. California Granny-Smiths are heavier to the smaller sizes as well. California Granny's have some flex in the price as most shippers are cleaning up. Washington Gala's are heavier on 88/100's and the market is steady. The Washington Fuji market dropped since the volume picked up. Most packers are peaking on larger size Fuji's. California Fuji's are steady and are peaking on the smaller sizes. Washington Honeycrisp is available and is peaking on 56/64/72's.

Asparagus ↔ Supplies out of Mexico have tightened up. The best sizing is being packed in standard and large in terms of quantities. Jumbos are tighter and the price is up. Peruvian product continues to have moderate availability and can still be loaded out of Miami if desired. The overall quality continues to be reported as being good in both growing regions.

Avocado ↑ Demand still remains very strong on all sizes, and now is exceeding supplies. Shipments are still setting industry records. Mexico's supplies remain extremely light with the heavy on and off rains in Mexico hampering harvest. Supplies don't look to begin their come back until mid October. California will go through October. California supplies cannot not keep up with the demand without help from Mexico. Chile has yet to bring much to the US with Europe take most of their fruit. Market is active and supplies short.

Bell Peppers — Western ↑ **Eastern** ↔ Green bell market is steady. Crops are currently shipping from Southern California and mostly large fruit available. Bells are loading from Fresno, Gilroy, Los Angeles, and (colored bells) South Texas. Supplies improving as new lots are harvesting. An expected cooling trend may press markets slightly higher as this is slowing down

production. We expect Coachella to start bell peppers by mid/late October. Open field colored Red bell market is firming up slightly as cooler weather approaches this week. Demand still exceeds availability from Southern California. New districts are set to come online by month's end Coachella). Gold bells markets continue steady availability depends on growing district. Extreme demand exceeds. Eastern Bells: South Georgia is a tad late getting started with their pepper. However, Michigan still has decent supplies and they are looking to move their remaining pepper. This will be a two tiered market for the next week or so as both regions price according to their supplies.

Broccoli ↑ The broccoli market is stronger than the previous week. Demand exceeds supplies and this will continue throughout the week. Twelve week averages are being watched by all suppliers, whether the order is for value-added or carton business. Escalated pricing is in effect on contracts. Salinas and Santa Maria continue to be the main growing regions with availability in Mexico as well.

Cauliflower ↑ The cauliflower market is stronger with all suppliers. Occasional brown spotting is still being reported upon arrivals. This market is expected to get stronger throughout the week with many suppliers.

Celery ↔ The celery market continues to be stable. Large sizing, 24s in particular has had better production numbers as demand has fallen off. Shippers are listening to offers on large volume type orders with this size. Supplies are expected to be good out of Santa Maria/Salinas until the middle of the week minimum.

Citrus — Lemons ↔ **Oranges** ↔ Lemons: Demand still exceeds supplies on all sizes from all shippers. This will continue on for another 2 to 4 weeks as the new crop Desert fruit builds inventory. The Ventura crop is basically done and what is left is old and tired. Oranges: The Valencia oranges are beginning to re-green. Re-greening occurs as the orange continues to ripen on the tree and the summer's warmer weather and longer day's cause the orange's skin to reabsorb chlorophyll, resulting in a green skin at the stem end. The fruit is still fully ripe, sweet and eats well. Valencia sizing is starting to peak on 88's/72's/56's. Demand and supply for small

fruit (113's/138's) is currently matching. New crop California Navels look to start in limited production by the end of the month.

Lettuce — Leaf ↔ **Iceberg** ↑ The leaf market overall is stable. Romaine supplies are moderate with some suppliers being better off than others. There is some price fluctuation in the market. The green leaf availability has increased with a few suppliers as demand has fallen off. There continues to be arrival issues that include tip and fringe burn. Romaine Hearts will be moderate in availability for the week. Red leaf is stable as well. Iceberg: This market is firm. Some suppliers are better off than others and this has caused price fluctuations as much as three dollars amongst shippers. Supplies are expected to be light to moderate for the entire week. There continues to be quality issues including tip burn, some mechanical damage, and pink ribbing. Weights on the average on palletized lettuce have ranged from 38-41 pounds. Some suppliers are ahead of fields trying to keep up with demand. This has caused lighter weights to occur.

Melons — Cantaloupes ↑ **Honeydew** ↑ Cantaloupe: The market is still demand exceeds on cantaloupe 9 and 12's. As the Westside finishes up product is extremely limited. Maricopa is just scratching this week so will have some very limited availability. Honeydew: Honeydew is finishing up on the Westside with limited availability and product running small. Nogales has started up with very low sugars and limited availability.

Onions ↔ Washington, Idaho, and Oregon are all steady on yellows. The Idaho/Oregon growing region has been hit with rain the last couple nights and has one more to go so expect lighter supplies for the balance of the week. Washington has been fairly dry the last few days and should be getting back to regular production. Both districts are still producing mostly jumbo & medium yellows while Colossals and Supers are in shorter supply. Colorado is still fairly wet but is packing. Red onions remain mostly steady in the northwest with some higher and have also been limited somewhat by the rain. Whites are steady on all sizes. The quality has been good on all colors in Washington, Oregon, Idaho, and Colorado.

Potatoes ↔ The Idaho market for both varieties is steady. The Norkotahs are still peaking on 60's, 70's, & 80's while the Burbanks are heavier to the smaller counts. Washington Norkotahs are steady to lower and they are still peaking 80's and larger now. Nebraska and Colorado are steady all sizes and continue to peak on 60's through 80's. Wisconsin russet prices are steady and are now one of the best bargains out there. Bakersfield is still bringing in Red, Gold, and White potatoes from Washington. Western Washington continues packing reds, whites, and Golds and they are all peaking on A-size. The Washington market is steady to lower. Wisconsin red potatoes are mostly steady on B's and C's with some flex on A-size. Minnesota red potatoes are steady on all sizes as well and they will also flex on volume orders of Red A's.

Tomatoes — Eastern ↓ **Western** ↔ Western: The past couple of week's rounds have been heavier with smaller sized fruit. This week larger fruit is more available bringing the price up on 6x7 as the price dips on 5x6. Elevated prices for Romas the past couple of weeks are driving demand downward. Roma prices may dip a bit but supplies will not increase significantly until Florida is in full swing by the middle of the month and Baja moves into better product by the end of the month. Grape and Cherry tomatoes remain tight but availability is slightly better this week. Eastern: Round sizing has improved with crown picks entering the market from Quincy and Virginia leveling prices between sizes. Romas are in very light production and volumes are not expected to show significant increase until Quincy is in full swing near mid-October. Prices may soften lightly if demand turns downward the next couple weeks while production is limited. Grape and cherry tomato market is steady with South Carolina helping the supply as they transition away from the Eastern Shore of Virginia.

