

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending June 5, 2015



COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	Moderate	Good	↔
Blackberries, Blueberries, Raspberries	Moderate	Good	↔
Strawberries	Low	Good	↔
Grapefruit, Pineapples	Moderate	Good	↔
Lemons	Moderate	Good	↑
Oranges, Navels	Moderate	Poor	↔
Limes	Moderate	Excellent	↓
Green & Red Leaf Lettuces	High	Good	↔
Iceberg Lettuce	Moderate to High	Good	↔
Romaine Lettuce	Moderate to High	Good	↔
Romaine Hearts	Moderate	Fair	↔
Cucumbers	Moderate	Fair to Good	↑
Green Beans	Moderate to High	Good	↑ (East)
Green Bell Peppers	Moderate	Good	↓
Red Bell Peppers	Moderate	Good	↑
Yellow Squash, Zucchini	Moderate	Excellent	↔
Broccoli	Moderate to High	Very Good	↔
Green & Red Seedless Grapes, Bok Choy, Napa, Spring Mix, Fennel/Anise	High	Good	↔
Plums	Moderate	Good	↔
Cantaloupes	High	Good	↔
Honeydews	Moderate	Good	↔
Artichokes	Moderate to High	Good	↔
Arugula, Carrots, Frisee, Mache	Moderate	Good	↔
Asparagus	Moderate to High	Good	↑
Bunched Spinach	Low	Good	↓
Parsley (Curly & Italian)	Moderate to High	Excellent	↔
Baby Spinach	Moderate	Good	↑
Cauliflower	Moderate	Very Good	↓
Celery	Moderate	Good	↓
Peeled Garlic	Extreme	Good	↔
Green Cabbage	Low to Moderate	Excellent	↔
Green Onions	Low	Fair	↓
Kale (Green)	Low to Moderate	Excellent	↔
Red Cabbage	Moderate	Excellent	↔
Snow & Sugar Snap Peas	High	Poor to Fair	↔
Red, Yellow, White Onions, Potatoes	Moderate	Good	↔
Round, Grape, Plum, Roma Tomatoes	Moderate	Good	↔
Red & Golden Delicious, Granny Smiths, Galas, Fujis, Braeburns, Cameos, Bartlett Pears, Red Anjous	Moderate	Good	↔
D'Anjous	High	Good	↔



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MARKET OVERVIEW

Green and Red leaf supplies are close to normal. Both Romaine Hearts and Romaine supplies are lighter this week. Very light supplies remain on Broccoli, but we should begin to see supplies meet demand as we head into June. The asparagus market has eased up. We will see more relief in June on jumbos. Most all herbs remain steady and in fairly good supply and quality. The Berry market remains strong. Good weather in Mexico has increased production on Blackberries. Quality and supplies are very good. Garlic remains tight as well. We will be watching hurricane Blanca and will update everyone if we foresee this storm damaging any crops.

LEMON UPDATE: A combination of factors are colliding to create a tight lemon market, especially on 140ct and larger. Domestically, the drought is affecting overall lemon supplies and decreasing the size profile in California. All California farmers have voluntarily reduced irrigation by 25% which results in a small size profile. Why? Citrus trees contain multiple crops and are continually in bloom. Trees naturally allocate limited water to the blossoms instead of additional size growth of the hanging fruit. Today's lemon size profile is heavy to 165ct and smaller. The preferred retail 95ct and 115ct are scarce and retailers are forced to slide down the scale to the preferred foodservice 140ct and 165ct. This concentrated demand further diminishes the already limited availability of the mid-sizes and forces foodservice buyers towards 200ct and 235ct. Chilean and Mexican lemons are usually an alternative this time of year. However, Chile and Mexico are facing maturity issues resulting in significant harvest delays. Rumors suggest there are finally Chilean lemons on the water to Europe. Imports from Chile and Mexico should offer modest market relief in the U.S. beginning next month. How long will this predicament last? California will not offer significant market relief until the desert crop begins in September. Until then, buyers will be forced to pay expensive prices and compete for the very limited supplies of 140ct and larger lemons. Buyers willing and able to switch to 165ct, 200ct and 235ct will reduce their stress during the summer months and pay less money for a steady supply of smaller lemons.

APPLES AND PEARS

Prices are unchanged; large sizes continue to dominate the market. Braeburn, Jonagold, Opal, and Pink Lady stocks are tightening. The new crop season will start in mid-August. Sugar levels are elevated, measuring 14 to 18 Brix (sugar to acid ratio). Washington Pear prices are low. The D'Anjou season will continue through July; stocks are dominated by 90-count and larger sizes. The California season will begin in early July; no supply gaps are expected. Quality is excellent: sugar levels range from 12 to 14 Brix.

ARTICHOKES

Light supplies of chokes expected to continue this week with sizes leaning a bit heavier toward the larger side. Large loose and small loose will be limited. Quality is good. Prices should continue to be about steady.

ARUGULA

Supplies of both baby and wild arugula are good and readily available. There are some sizing issues along with slight yellowing, but quality is good.

ASPARAGUS

Cold weather continues to limit domestic supplies, especially large sizes. The California season will run through July; quality is excellent.

AVOCADOS

Prices are level. California volume is high, particularly 60-count and smaller sizes. The Peruvian season has begun.

BLACKBERRIES

The market is slightly lower than last week. Stocks are increasing in California and Georgia. The Mexican season will continue for two more weeks. Domestic quality is best: sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Prices are level. Although California supplies are ample, they are decreasing. The Mexican season will end in mid-June, but harvesting will begin in Oregon and New Jersey at the same time. Quality is very good: fruit is sweet and firm.

BOK CHOY

Tight supplies, high prices.



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BROCCOLI

The California broccoli market is dropping; warm temperatures have increased growth and brought volume closer to normal levels. Mexican stocks remain limited. Domestic quality is very good: purple beading is a minor issue.

CANTALOUPE

Market has eased as we are packing out of Arizona, and the California desert with excellent quality due to very good weather and a nice set of fruit throughout, we are peaking on volume this week and then will see the volumes taper off a bit next week but a good steady supply of fruit available through the first of July and then transition up to the Central Valley around the end of June or first of July. The overall sugar content is excellent and the fruit is very clean on the exterior it is one of the best overall quality starts we have had in years. Quality is excellent: sugar levels range from 13 to 14 Brix.

CARROTS

Availability is good for jumbo carrots in California. Quality is good.

CAULIFLOWER

The cauliflower market is dropping; warm temperatures have increased growth and brought volume closer to normal levels.

CELERY

Prices are starting to inch down. Oxnard supplies are increasing; the Salinas new crop harvest has begun.

CUCUMBERS

EAST: Good supplies continue and FOB prices continue to be at low levels but supers are demanding a premium compared to last week. Quality is generally good. **WEST:** Good supplies but quality is weaker. FOB prices generally steady.

EGGPLANT

EAST: Much stronger demand (west is having to pull from the east) is causing FOB prices to be stronger this week. Quality continues to be good. **WEST:** Practically no supplies are available.

FENNEL/ANISE

Very light supplies this week and the next two weeks.

GARLIC

Poor domestic growing conditions and decreased Chinese product availability are negatively impacting supply and price again. Though we have seen some slight relief over the past month, Chinese ports will once again be closed until further notice. Ongoing drought and limited acreage in Southern California will also reduce availability and increase cost for domestic supply.

GINGER

The ginger market has improved, prices are moderate and will continue to be moderate.

GRAPES

Market is fluctuating as we have started new crop California and Mexico. There has been some big pack outs out of the Mexico fruit and there is plenty of reds loading out of Nogales with some deals being made the overall quality is excellent with very good size and color and good availability on all sizes of fruit. The Coachella valley fruit is also coming on good with good volume of reds and starting to see better volumes of sugarones with perlettes finished up out of there. Expect to have good volumes of fruit out of both of these regions through the end of June and we will probably start up here in the Central Valley around the end of June and then we will be going through December here in the Central Valley and the overall crop has a good set on it up here and we expect a decent overall crop.

GREEN BEANS

Prices have firmed in the East, as the harvest moves from Georgia to North Carolina. Steady availability and price for new crop round beans in Southern California and the Central San Joaquin Valley; continued supply from Baja California.

GREEN CABBAGE

Supplies and yields have been increasing over the past week and expected to be above average for the next 10 days. This has put some extra supplies into the California market, but some regional areas are still starting up slowly while dealing with some weather related effects.

GREEN ONIONS

Green onion market remains poor, especially iced. Still good volume crossing daily with little demand on iced green onions. Iceless remains steady, with decent demand. We will most likely not see any change in the market until Mexican growers get into lighter supplier plantings sometime by mid-June.

HONEYDEW

Market is split as there is a fair amount of Mexican fruit crossing as well as USA fruit coming out of the Arizona and California deserts. The overall quality is excellent out of both regions with weather a bit milder we are seeing excellent sugar content, beautiful interior color and nice white to cream exterior color with a clean appearance overall. We will be harvesting through June in the desert and then start up here on the Westside around the first of June. Sugar levels range from 11 to 13 Brix.



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KALE (GREEN)

Kale numbers are very good this week. Quality and appearance continues to be beautiful with bunches averaging 12-14" in length with dark green color.

KIWI

Chile is the main supply area. California is starting. Italian is available off the East Coast and on the West Coast.

LEMONS

Market is extremely strong and demand exceeds supply on all sizes and grades and expect things to be this way for a while depending on the amount that is imported from Chile and how much Mexico will bring across as well. But we do expect the prices to be at or above what we experienced last year during this time frame. The overall quality is fair to good, but with our lack of water trees are stressed as well as the fruit which means weaker fruit. We will be in this tight and demand exceeds situation through August and then we will start dist. 3 which will hopefully start early with good volume as the crop set looks very good at this point barring any major weather issues.

GREEN LEAF/VARIETY LETTUCE

The market is easing. Recent quality problems such as fringe burn, wind burn, and thrip damage are improving.

ICEBERG LETTUCE

The market is slightly higher than last week; supplies are sufficient despite persistently cool weather.

ROMAINE LETTUCE

Prices are slightly higher than last week. Quality is very good, but thrip damage is a minor problem.

ROMAINE HEARTS

Overall supplies will be lighter this week. The lighter supplies are due to a both weather and yields. Due to the cooler temperatures, the product has slowed down in its growth, causing a lack in supplies for this week, and next. The overall yields in the fields are less due to fringe burn issues that are in the fields. Despite the fringe burn, crews are trimming the product best as possible to minimize what gets into the final pack. There is a $\frac{3}{4}$ cupping of the heart. The heart still has a good ratio of bleach to green. Overall quality is good.

LIMES

The market is low; supplies are ample. Quality is excellent: skins are dark green and flavor is bright.

MANGOS

Quality is very good now, and all coming out of Mexico and loading in Hidalgo, TX. Sizes will be trending more on the larger size with smaller fruit, 10ct and up, a little shorter. Guatemala is done, so there is no longer any product in Miami.

NAPA

Improved supplies. Market has stabilized.

ONIONS

The market is elevated, but stocks are increasing in California and New Mexico. Most field conditions have improved from the effects of recent rain.

ORANGES

Market very strong across the board with excellent demand, we are packing navels and Valencia's with very good demand on late navels, which we are peaking on 56's and 72's and very few 88's and smaller which is keeping things very tight on all sizes and both varieties. Expect to have supplies of navels for another month and then be dependent on Valencia's until we see some Chilean navels start to arrive around the end of June. The Valencia crop is about 20% lighter than last year so expect prices to keep firm and increase as we go through the summer. The overall quality is fair with good juice content on the Valencia's and some hit and miss dry cell on the navels, but overall strength of the fruit is a little weak, due to the lack of water that we are experiencing. The really tough times as far as availability and fruit quality will be around the end of August through October until we start navels towards the first of November. Sugar levels range from 12 to 13 Brix.

PARSLEY (CURLY, ITALIAN)

Curly parsley numbers are plentiful this week. Quality is very nice with bunches averaging 8-10" in length and showing dark green color. Italian parsley numbers are up from last week and expected to continue to improve as the week goes on. Quality continues to be excellent with bunches averaging 9-11" in length and showing dark green color. Demand throughout the industry continues to exceed supply and market prices are soaring.

GREEN BELL PEPPER

EAST: Good supplies continue as GA continues to harvest. Plant City continues with a few smaller sizes but is practically finished. FOB prices generally steady. **WEST:** Good supplies continue. FOB prices generally steady.



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JALAPEÑO PEPPER

EAST: More supplies from GA available. FOB prices are down this week. Quality is generally good. **WEST:** Supplies and demand remain in equilibrium causing FOB prices to be stable. Quality remains good.

RED AND YELLOW PEPPER

Prices are steady. California stocks are abundant. Mexican supplies (into San Diego, California) are sufficient.

PINEAPPLE

The market is unchanged; supplies are abundant in both regions. Fruit is juicy with tropical flavor. Sugar levels are high, ranging from 13 to 14 Brix.

IDAHO POTATOES

The market is mostly steady except for 70's and 80's. These two sizes getting a lot of play due to their price. We have about 8-9 weeks remaining in old crop potatoes and quality is still hold up very well.

RASPBERRIES

The market is unchanged. New crop California volume is rising. The Mexican season will end in mid-June. Domestic quality is best: flavor is sweet and texture is tender.

RED CABBAGE

Red cabbage production this spring is stronger than it has been for many months. Production is steady and yields are above average while weights, color and sizing are very good. The market remains strong.

SALADS & BLENDS

Mixes that contain arugula and spring mix are exhibiting moisture at the 7- and 12-day shelf life mark; light decay and breakdown are issues.

SNOW AND SUGAR SNAP PEAS

Snow peas and sugar snaps are still in a strong market. (Peru, Mexico, and California). Prices remain in the highs for both. Quality is good.

SPINACH (BABY)

There are very good supplies of baby spinach and clipped spinach. Quality is good with some wind damage and half leaves.

SPINACH (BUNCHED)

Volume has increased due to higher yields and multiple blocks ready to harvest at the same time. Quality remains excellent with full, dark green bunches and 12-13" length. Prices are lower with many local regional growers having started production.

SPRING MIX

Some packs are exhibiting moisture at the 7- and 12-day shelf-life mark; inspectors are monitoring for premature breakdown.

GREEN SQUASH

EAST: Good volume coming out of several states. FOB prices generally steady. Quality is good. **WEST:** Good supplies from various growing regions causing FOB prices generally steady. Quality is good.

YELLOW SQUASH

EAST: Various regions continue to produce including SC, NC and NJ. FOB prices up from last week but still at relatively low levels. Quality is good. **WEST:** Supplies available from Nogales, Oxnard, Fresco and Baja. FOB prices generally stable at low levels.

STRAWBERRIES

The market is level. Warm weather continues to increase overall stocks and berry size. Quality is very good: fruit is deep red and sweet.

TOMATOES

EAST

Rounds

Yields from the Palmetto-Ruskin fields in Central Florida have fallen dramatically during the past week and we expect this to be the final week of production out of this area. Quality has also fallen as decay has become evident due to the high amount of rain the fields have received recently. We have begun to harvest out of the Quincy region. As reported last week, less volume is expected out of this area compared to prior years due to lighter plantings and the large amount of rain these fields have received. We are going to start harvesting our SC fields this weekend. Volume will be scattered and light to begin. These SC fields have also received a lot of rain and more is forecasted this week. Due to the decrease in supplies, FOB prices are up substantially on all sizes this week. We expect prices to remain relatively strong for the next 3 or so weeks.

Romas

The Palmetto region has practically finished. FOB prices up slightly on all sizes. Quality is variable.

Grapes

Supplies continue to be relatively good. Quality is good. SC crop has begun. FOB prices up slightly from last week.

Cherries

Supplies down from last week. FOB prices are up moderately from last week. Quality remains generally good.



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WEST/MEXICO

Rounds

Mature greens have started to be harvested with more growers coming on-line in the next week or two. Increase demand is putting upward pressure on the vine-ripes. The larger fruit and better quality continue to cross at Baja. Smaller fruit with variable quality continues to cross as Nogales.

Romas

Growers in all regions are selling out daily and are cutting back orders. FOB prices are stronger this week as a result. Nogales, Baja and TX crossings continue but are down at all crossing points. Quality is variable but good quality can be found. We do not expect these stronger FOB prices to be long-lived and will probably fall back within 3 weeks or so.

Grape

FOB prices are generally steady. Quality is variable.

Cherries

Market generally steady as supply and demand remain stable from last week.

TREE FRUIT

Supplies of new crop California apricots, nectarines, peaches, and plums are finally starting to increase; the market has stabilized. Pre-conditioned fruit will become available in a week or two. Quality is very good, but size is slightly smaller than in years past.

WATERMELON

Prices remain low. Supplies are plentiful in Arizona, California, Georgia, and Mexico, but the market will start to inch up once summer demand hits. Quality is very good: sugar levels range from 10 to 12 Brix.