

# FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending June 12, 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	High	Good	↔
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	Good	↔
Green & Red Seedless Grapes, Napa, Fennel/Anise	High	Good	↔
Plums, Bok Choy, Spring Mix	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	Good	↓
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 normal. Both Romaine Hearts and Romaine supplies are good this week along with demand. Broccoli supplies have improved; beginning to see supplies meet demand. The Lemon market is very tight and we are seeing very few 140's and larger. The asparagus market has eased up. We will see more relief end of June on jumbos. Most all herbs are in good supply and quality. The Berry market remains strong. Good weather in Mexico has increased production on Blackberries. Quality and supplies are very good. The fennel market is tight, and we are seeing high prices. We are hoping for an improvement next week. Garlic remains tight as well.

## APPLES AND PEARS

Demand is fair, and supplies good on reds, adequate on other varieties. Retailers are now looking to promote summer seasonal items, leaving even greater promotional opportunities on apples, especially 88s and larger red delicious any grade. Small size reds are a little easier to obtain as schools are nearing the end of session and buyers are scaling back. Lower grades on Granny Smith are harder to find. Overall quality remains exceptional. Sugar levels are elevated, measuring 14 to 18 Brix (sugar to acid ratio). Some growers are winding down on Honeycrisp, Pink Ladys, & Cameos Pears (especially 110x and smaller) continue to exceed supply. Supplies are tight, mostly on fancy grade, and crop is running heavy to U.S. #1, peaking 90s and larger. Quality is excellent: sugar levels range from 12 to 14 Brix.

## ARTICHOKES

Light supplies of artichokes 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

The market has become much better. We will see more asparagus in the markets from Washington, New Jersey and soon Canada. Quality will improve, but expect jumbos to remain tight through June. Quality is good and has improved.

## AVOCADOS

Pricing is stable; no real demand. There is good availability on all sizes/grades.

## BLACKBERRIES

Mexico is done for the season. California continues to come on and is slowly gaining speed each week. West coast looks to be snug for the next few weeks. Georgia volumes have gained full speed. Quality in Georgia is really good; both color and flavor are excellent. Sugar levels range from 12 to 13 Brix.

## BLUEBERRIES

Delano product quality is good but picking costs are becoming an issue. Stockton is close to hitting its peak. Expect very good quality since growing weather and picking conditions have been stellar. Oregon will be off to a modest start end of the week but will begin to show a good weekly availability with Duke and Reka in the lead. Washington has excellent growing weather; Sumas looks like it will have a very good crop. Still predicting to start picking June 20 for most growers in BC, Canada. In Georgia, high volumes of fresh Rabbit eye blues continue. All early and mid-season varieties are being harvested at this time. Rains have caused some deterioration of quality due to splits. Rain remains a constant threat through the week. Georgia is at peak volumes. North Carolina quality is good and growers are staying fairly current on the harvest. In New Jersey, first pick Duke should start 6/16. Earliblue and Bluetta harvest in Michigan, and Duke in Indiana will start with lower volumes. Winter temperature injury and cane diseases affecting many acres.

## BOK CHOY

Tight supplies, high prices.

## BROCCOLI

Broccoli production is steady and we are generating exceptional yields for this time of year. However, we are still seeing #1 labels and exports difficult to find. Fields are producing a good green color, texture and overall good appearance.





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## 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

Supplies throughout the industry are steady, but not excessive. Quality should be fair and supplies are moderate.

## CELERY

The market has been trending down for the last few days. Some shippers are starting to harvest in Salinas this week. All celery in Salinas has been transferred from either Santa Maria or Oxnard. Quality is nice in both locations aside from a bit of insect damage and dirt showing up in some heads.

## CUCUMBERS

**EAST:** Supplies are tighter this week causing stronger FOB prices. NC has just started harvesting but it will be next week before any appreciable volume. Quality is generally good. **WEST:** FOB prices slightly stronger this week. Quality is improving.

## EGGPLANT

**EAST:** More volume coming out of GA. FOB prices are weaker as a result. Quality continues to be good. **WEST:** PSupplies continue to be extremely tight and will continue to be so for 7-10 more days until Bakersfield starts harvesting. Currently, the west is mostly going east to meet demand.

## 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 descent overall crop.

## GREEN BEANS

Prices have firmed in the East, as the harvest moves from Georgia to North Carolina. Production will be very light from California and The Baja this week.

## GREEN CABBAGE

Green cabbage supplies are above average. Market is steady. Quality is very nice with large head size and heavy at 50+ lbs. weights in most cartons.

## 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.

## 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.

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## 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 do our best to cover orders but we will need to prorate at times depending on our pack schedules, and availability it is going to be a rough ride but we will get through it. 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/RED LEAF LETTUCE

Supplies are good on both green and red leaf. Very light mildew, light fringe burn. Demand is good.

## ICEBERG LETTUCE

This week has been the lightest supply on Iceberg we have seen since we came back from Yuma. Quality is good and weights are lighter though with good appearance.

## ROMAINE LETTUCE

Romaine supplies are good. Demand is also good. Insect pressure is still a factor in the fields along with light mildew and light fringe burn. Growers are trying to keep to a minimum.

## ROMAINE HEARTS

Romaine heart supplies are normal. Demand is good. Quality is good. Light insect pressure in the fields.

## LIMES

Best values on 200s and smaller but larger sizes are also reasonable.

## 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.

## NAPA

Improved supplies. Market has stabilized.

## ONIONS

Market remains firm on jumbos and larger. California crop size profile is towards the smaller sizes. Supers and Colossal are extremely tight from California. New Mexico has a much bigger size profile but is barely able to keep up with demand. At this time, there is a nice balance between supply and demand on red onions. Fob's remain steady. For the near future, markets are likely to remain steady into next week.

## 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 is steady. Italian parsley supplies are below average.

## GREEN BELL PEPPER

**EAST:** Stronger supplies as GA continues to furnish most pepper in the East. FOB prices lower. Quality is good. **WEST:** Good supplies continue in the west as the Bakersfield region begins to harvest. FOB prices generally lower. Supply of medium sized pepper is relatively tight.

## JALAPEÑO PEPPER

**EAST:** More supplies from GA available. FOB prices are down again this week. Quality is good. **WEST:** Good supplies continue and FOB prices remain generally unchanged. Quality remains good.

## RED AND YELLOW PEPPER

The market is stable. California volume is high. Mexican stocks (into San Diego, California) are average.



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## PINEAPPLE

Prices are level; volume is high in all regions, but a seasonal supply gap is expected in late June. Fruit is juicy with tropical flavor. Sugar levels are high, ranging from 13 to 14 Brix.

## IDAHO POTATOES

No changes are expected for the next week to 10 days. There is an enormous imbalance regarding pricing between larger and smaller sizes. Larger sizes such as 70ct and larger will remain tight for the remainder of the storage crop. Deals can be made on large orders of 80ct and smaller. Quality is decent, but shelf life will become an issue as we get deeper into the summer.

## RASPBERRIES

Mexico production has finally come to an end, and California will slowly increase week by week and then remain steady. Quality and flavor is great overall. Watsonville will remain snug for the remainder of this week and Santa Maria/Oxnard is sold out.

## RED CABBAGE

Substantial volume this week. Heads are large and heavy (up to 60-70 lbs.). Market is steady.

## SALADS & BLENDS

The market is level; supplies are sufficient. Premature pinkening has been reported, but shelf life remains exhibiting very good quality.

## 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, half leaves and occasional oversizing.

## SPINACH (BUNCHED)

We are expecting steady supplies for the next 2-3 weeks. Bunches are full and dark green in color. The overall market continues to see downward pressure.

## SPRING MIX

Spring mix supplies are very good. Produce quality is good although showing slight quality issues of yellowing and oversizing.

## GREEN SQUASH

**EAST:** Good volume coming out of several states. FOB prices generally steady. Quality is good. **WEST:** Supplies continue from several growing regions with the similar gap situation as the yellow in the west. This is causing upward pressure on FOB prices. Quality is good.

## YELLOW SQUASH

**EAST:** Various regions continue to produce including SC, NC and now NJ with more volume. The increase in supplies is putting downward pressure on FOB prices. Quality is generally good. **WEST:** Supplies continue from several growing regions but several of the fields are in a short gap situation which is causing some tightness of supplies and upward pressure on FOB prices.

## STRAWBERRIES

California continues to peak this week in Watsonville/Salinas for fresh production. Even with the warmer weather, strawberries still look to be tight all week. Varieties in the North remain the same; mostly producing Monterey, with some Albion and San Andreas. Quality is very good: fruit is deep red and sweet.

## TOMATOES

### EAST

#### Rounds

The Palmetto-Ruskin region has all but finished for the season. The Quincy region is in full swing but yields and sizing is down slightly this year compared to past years. We also started harvesting our SC fields over the weekend. FOB prices remain generally unchanged from last week as supply and demand remain in equilibrium. As reported below, the CA fields are starting up this week and next week.

### Romas

Eastern romas coming primarily from the Quincy region and harvest has also begun in SC. FOB prices are generally stable with some upward pressure as supplies are relatively tight.

### Grapes

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

### Cherries

Supplies a little stronger this week. FOB prices are steady to down slightly. Quality remains generally good.





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## WEST/MEXICO

### Rounds

Mature greens have started to be harvested by one grower this week with six or seven more growers starting up this week and next week. This new volume will allow western suppliers to use western product and not have to pull from the east. The CA growing regions have experienced extremely hot weather (107 degrees yesterday). As of now, quality has not been affected but extended extreme temperatures will eventually have a detrimental effect on quality and shelf-life. We will keep you posted. As for vine-ripes, larger fruit and better quality continue to cross at Baja while smaller fruit with variable quality continue to cross as Nogales.

### Romas

Supplies have not changed from last week but demand has fallen which has caused FOB prices to fall this week. Nogales, Baja and TX crossings continue. Quality is variable but good quality can be found.

### Grape

Good supplies continue and FOB prices are generally steady at or near Suspension Agreement minimums. Quality is variable.

### Cherries

Better supplies available this week causing FOB prices to be lower.

## TREE FRUIT

New crop California apricot, nectarine, peach, and plum supplies are increasing; prices are steady. More sizes and varieties are becoming available. Quality is excellent, but size is slightly smaller than last year.

## WATERMELON

Supplies are tightening up in Florida as they are winding down. However, Georgia and South Carolina are scheduled to start next week. Nogales is flooded with fruit, and Texas melons are readily available. The overall market will continue to show weakness and starting to load next week. Seeded melons extremely tight. Quality is very good: sugar levels range from 10 to 12 Brix.