

# FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending June 26, 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	Good	↔
Romaine Hearts	High	Good	↔
Cucumbers	Moderate	Fair to Good	↑
Green Beans	Moderate to High	Good	↔
Green Bell Peppers	Moderate	Good	↓
Red Bell Peppers	Moderate	Good	↑
Yellow Squash, Parsley (Curly)	Moderate	Excellent	↔
Broccoli	Moderate	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 (Italian)	High	Excellent	↓
Baby Spinach	Moderate	Good	↑
Cauliflower	Moderate	Fair	↔
Celery	Low to Moderate	Excellent	↓
Peeled Garlic	Extreme	Good	↔
Green Cabbage, Zucchini	Low to Moderate	Excellent	↔
Green Onions	Low	Good	↓
Kale (Green)	Low	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

As we continue to move into the summer months, national demand has been picking up in the produce markets. Production and supplies are doing well to keep up with this higher demand for many products, such as several of the Central California veggies (cilantro, leaf lettuces, etc.) and other various markets. Supplies, quality and demand are good on green and red leaf lettuce; however, there is heavy insect pressure in all leaf lettuce. Both Romaine Hearts and Romaine continue to be lighter in supply. Broccoli and Cauliflower supplies are steady this week. Unfortunately, the Lemons Market is not one that has been able to keep up with demand, as the market is in its demand exceeds supply state. The drought has made it difficult to grow larger fruit and to have as many trees as in past years. Smaller sizes, namely 200 ct., are more readily available and have prices significantly lower than larger sizes; clients should consider stocking smaller sizes or subbing for limes if possible, as the Lime Market is steady and will remain steady throughout the summer.

## APPLES AND PEARS

Prices are weak; large sizes dominate available supplies. Braeburn, Jonagold, Opal, and Pink Lady stocks are tightening. California new crop Granny Smith harvesting will begin in July. The Washington season will start in mid-August. Sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). The Washington Pear market is near the bottom. D'Anjou stocks will be on the market through July; the crop is dominated by 90-count and larger sizes. Harvesting will begin in California by early July; no supply gaps are forecast. Quality is excellent: sugar levels range from 12 to 14 Brix.

## ARTICHOKES

Steady supplies this week with sizes leaning a little heavier toward the larger side. Smaller sizes, large loose and small loose will be fine. Quality is good.

## 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 is stable despite limited supplies. The California harvest is winding down; feathering and seeders are slight problems.

## AVOCADOS

Prices are steady. Despite strong demand, stocks are abundant in California and Mexico. Peruvian supplies will be on the market through the summer.

## BLACKBERRIES

Strong demand is driving up the market. Production is under way in California, Georgia, and North Carolina. The Mexican season is winding down. Domestic quality is best: berries are plump and sweet. Sugar levels range from 12 to 13 Brix.

## BLUEBERRIES

West Coast prices are weak, but will rise soon as the Mexican season is ending and California production is in transition. Harvesting will start in British Columbia next week.

## BOK CHOY

Tight supplies, high prices.

## BROCCOLI

The market is stable; ideal weather is promoting growth and increasing volume. Domestic quality is very good: long, branchy crowns are a minor issue.

## CANTALOUPE

Market is strengthening due in climate weather as we are expecting storms through Thursday in the Mexico and California and Arizona regions. We will be packing minimal volume today and tomorrow in regions where the rains hit, probably going to be a little rocky as far as supplies through this week and then things should settle out by the first of next week and back to some normal volume. Quality is excellent: sugar levels range from 13 to 14 Brix.

## CARROTS

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



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## CAULIFLOWER

Although the market shot up, it has stabilized. Recent high temperatures are increasing supplies.

## CELERY

Prices are weak. California stocks are plentiful; regional harvests will start soon, further decreasing demand.

## CUCUMBERS

**EAST:** NC has started. Supplies are increasing. Current FOB prices are higher than they were this time last week but we see downward pressure on those prices. Quality is generally good. **WEST:** Supplies are tight and FOB prices are stronger this week. Quality is generally good.

## EGGPLANT

**EAST:** Good supplies still coming out of GA. FOB prices are weaker on fancy and steady on choice. Quality continues to be good. **WEST:** Bakersfield has started harvesting so there is finally some supply available in the west. FOB prices are down. Some suppliers will still probably have to go 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. We will provide notification as soon as relief is to be expected.

## GINGER

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

## GRAPES

Market steady as we are packing in Coachella California and Mexico crossing in Nogales Az. The overall quality is excellent on reds and greens with good sugar content and excellent color. This has been one of the better starts in years and we hope to continue here in the Central Valley with excellent quality once we start around the first of July and will carry us through Mid-December. All indications show a very promising year on California table grapes. This is a great time to promote California Grapes. Green seedless sugar levels range from 16 to 17 Brix; portioned grapes and red seedless levels range from 19 to 21 Brix

## GREEN BEANS

Good availability in Georgia and North Carolina. Adequate supplies in California and from Baja California.

## 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

Due to historically low market pricing on iced green onions the past 5-6 weeks, packing has been reduced until the market improves above packing cost levels. Iceless green onions have seen steady demand and should continue this week at current price levels.

## HONEYDEW

Market also strengthening due to the storms that will hit most all the growing regions, we expect lighter volume through this week and hopefully will be back to normal by the first of next week. The overall quality of the fruit has been very nice with an exceptionally clean exterior and very good internal sugar and color. 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 are 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 will be available on the West Coast in a week.

## LEMONS

Demand Exceeds Supply on all sizes except 235's and 200's but remain very tight. The overall quality of the fruit is good to fair with some blocks showing a little higher maturity that we like to see, we are picking in (dist 2) in the southern Coastal region of California which along with Chilean (starting to arrive now but better volume by the end of June) and Mexico (starting now but better volume end of June) fruit will hopefully carry us until we start Dist. 3 the California Arizona desert region around the first of September. All shippers will be battling the demand exceeds supply situation probably through August. Sugar levels range from 6 to 8 Brix.

## GREEN LEAF/RED LEAF LETTUCE

Prices have inched down a bit; supplies are abundant. Quality is very good, but early breakdown, insect pressure, and mildew are minor problems.





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## ICEBERG LETTUCE

The iceberg lettuce market continues to rise; demand is strong, but should stabilize later this week.

## ROMAINE LETTUCE

Prices are steady at elevated levels; high-quality supplies are tight throughout the industry. Quality is very good, but fringe burn and wind damage are issues in some lots.

## ROMAINE HEARTS

Overall supplies will be tight 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 the next couple of weeks. The overall yields in the fields are less due to fringe burn issues that are in the fields. Despite the fringe burn, we are trimming the product the best we can so that we can 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 should remain low through the summer; volume is high. Quality is excellent: flavor is tart and 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.

## NAPA

Improved supplies. Market has stabilized.

## ONIONS

Yellows, reds and whites are all down a little this week. All the sheds in California and New Mexico are in full production and supply is very good. We look for this good supply situation to last over the next 10 to 14 days. There will be some NM sheds that are expecting a short gap in about two weeks. These temporary supply gaps often push fob prices during the summer months.

## ORANGES

Market steady with descent supplies of all sizes on Valencia's, we still have some navels available but primarily all Valencia's as the navels are showing some weakness. The overall quality of the Valencia's is good with excellent sugar, juice and internal color, the exterior color is showing a tinge of green on the bloom and stem end. We will have Valencia's through October and since the crop is about 20% lighter than normal we will probably see things get very tight around the end of August. 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:** SQuality out of the GA fields is beginning to suffer due to the age of the plants and the extreme heat. NC fields should start to produce this weekend but the market may get active before appreciable volume can start out of these new fields.

**WEST:** Good supplies continue in the west out of the Bakersfield region and Fresno. FOB prices generally steady with some downward pressure.

## JALAPEÑO PEPPER

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

## RED AND YELLOW PEPPER

Prices are climbing. California growers are transitioning between regions. Mexican supplies are sporadic.

## PINEAPPLE

Although the market is weak, it will inch up slightly by the end of the month; a seasonal supply gap in Costa Rica will last for approximately three weeks. Fruit is juicy with tropical flavor. Sugar levels are high, ranging from 13 to 14 Brix.

## IDAHO POTATOES

The market has softened a little this week on 80cts and larger. We believe this is a minor adjustment and it is not the beginning of any serious fob decline. Availability on 40 and 50 counts has not improved at all nor do we expect anything different for the balance of the season. Quality is still looking good.

## RASPBERRIES

The California market is stable; stocks are increasing and will hit peak volume in late June. The Mexican season is winding down. Domestic quality is excellent: flavor is sweet and texture is tender.

## RED CABBAGE

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

## SALADS & BLENDS

Prices are unchanged; iceberg and romaine raw product supplies are ample. There are sporadic reports of premature pinking, but overall shelf-life is normal.



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## 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 (BUNCHEDED)

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

The market is steady. Recent high temperatures could cause dehydration, fringe burn, higher respiration rates, increased insect pressure, mechanical damage, and yellowing.

## GREEN SQUASH

**EAST:** The opposite is true for green squash. Good volume coming out of several states. FOB prices are down. Quality is generally good. **WEST:** Supplies are increasing putting downward pressure on FOB prices. Quality is good.

## YELLOW SQUASH

**EAST:** Supplies are tighter this week which has caused FOB prices to be stronger. The heat is affecting quality. **WEST:** Quality has been only fair out Otay Mesa all week but we are beginning to see some slight improvement. There has been some slight upward pressure on FOB prices.

## STRAWBERRIES

Strong demand is driving the market up a bit, but overall prices are level. Stocks are plentiful and berry size ranges from medium-plus to large. Quality is very good: fruit is deep red and sweet.

## TOMATOES

### EAST

#### Rounds

In the East, the primary sourcing areas are the Quincy, FL and coastal SC regions. Supplies are able to keep up with demand. Some growers in SC are having a difficult time finding the labor needed to harvest the crop. FOB prices are down on all sizes.

### Romas

Supplies are being harvested in the Quincy and coastal SC regions. FOB prices are stable. Quality is good.

## Grapes

Supplies continue to be relatively good. Quality is good. SC is major sourcing region. FOB prices steady from last week.

## Cherries

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

## WEST/MEXICO

### Rounds

All but two growers have started harvesting mature greens out of CA. Unfortunately, as predicted last week, due to the extreme heat (107 degrees), quality is being reported as extremely variable with most of the crop quality only fair thus far. The better quality is bringing a premium. Because more growers are harvesting this week, there are more supplies and FOB prices are down from last week. As for vine-ripes, two growers out of MX stopped harvesting a couple of weeks early this year due to the effects of Tropical Storm Blanca. Good supplies still available.

## Romas

FOB prices are at or near Suspension Agreement Minimums. 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

Supplies continue to improve slightly causing FOB prices to be lower.

## TREE FRUIT

The California apricot, nectarine, peach, and plum markets are average; supplies are increasing weekly. Quality is very good, but size is a bit smaller than last year's crop. Fruit is sweet and juicy. Nectarine sugar levels range from 10 to 12 Brix, while nectarines vary from 9.5 to 11 Brix and plums from 12 to 16 Brix.

## WATERMELON

Prices are level; volume is high in all regions. Expect the market to start climbing when summer demand strengthens. Quality is very good: sugar levels range from 10 to 12 Brix.