

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending July 17, 2015



COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	Moderate	Average	↑
Blackberries, Blueberries, Raspberries	Moderate	Good	↔
Strawberries	Moderate	Good	↔
Grapefruit, Pineapples	Moderate	Good	↔
Lemons	Moderate	Good	↑
Oranges, Navels	Finished	n/a	n/a
Limes	Moderate	Excellent	↓
Green & Red Leaf Lettuces	Moderate	Good	↔
Iceberg Lettuce	Moderate	Fair	↔
Romaine Lettuce	Moderate	Good	↔
Romaine Hearts	Moderate	Excellent	↓
Cucumbers	High	Fair	↑
Green Beans	High	Good	↑
Green Bell Peppers	High	Good	↔
Red Bell Peppers	High	Good	↔
Yellow Squash, Zucchini	High	Good	↑
Broccoli	Low to 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 (Curly, Italian)	Moderate	Excellent	↔
Baby Spinach	Low	Good	↓
Cauliflower	Low to Moderate	Good	↑
Celery	Low to Moderate	Excellent	↑
Peeled Garlic	Extreme	Good	↔
Green Cabbage	Low	Excellent	↔
Green Onions	Low	Excellent	↔
Kale (Green)	Low	Excellent	↔
Red Cabbage	Moderate	Excellent	↔
Snow & Sugar Snap Peas	High	Poor to Fair	↔
Red, Yellow, White Onions	Moderate	Good	↔
Round, Grape, Plum, Roma Tomatoes	Moderate	Good	↔
Red & Golden Delicious, Granny Smiths, Galas, Fujis, Braeburns, Cameos	Moderate	Good	↔
Potatoes (Idaho Russets)	Variable	Good	↔



FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending July 17, 2015



MARKET OVERVIEW

Dry Vegetable Commodities: Weather continues to play havoc with the supply and quality of most eastern dry veg commodities. Much cooler and wetter weather in Michigan is causing those crops to be behind schedule. The extreme heat that the southern growing regions experienced for most of June has caused those crops to end earlier than normal and with variable quality. Heavy rains have also occurred over the past several weeks in the TN/NC mountain growing regions. FOB markets continue to be active and high with variable quality. Supplies continue to be on the lighter side this week on Romaine and Romaine Hearts. Supplies are above average on both Green and Red leaf lettuce. There are average supplies of iceberg. Broccoli and Cauliflower supplies are steady this week. In Salinas, product is being harvested in good volumes as the warm weather continues to make for favorable growing conditions. We could see some market increase on Lettuce, Broccoli, Cauliflower and Celery by middle of next week due to the warm weather in Salinas. It helps promote growth and supply for product, but there is potential for a supply gap if product is harvested too far ahead of schedule. Lemons supply still exceeds demand!!!! The banana and pineapple market has been affected by the rain in Costa Rica and we are seeing a supply shortage.

APPLES AND PEARS

Prices are steady at low levels; 88-count and larger sizes are most plentiful. The California season will begin in late July. New crop harvesting will start in Washington by mid-August. Sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). The Washington Pear market is weak. D'Anjou supplies will remain on the market through July; the crop is dominated by 90-count and larger fruit. California production will begin next week. Quality is excellent: sugar levels range from 12 to 14 Brix.

ARTICHOKES

Volume has increased. Packing mostly 12's and 18's. Quality is good. Prices are a little lower on the larger sizes. Volume is expected to be good for several weeks.

ARUGULA

Supplies of both baby and wild arugula are good and readily available. Quality is good.

ASPARAGUS

Prices are slightly higher than last week; the California season is over. Stocks are increasing in Central Mexico, but Peruvian supplies are tight.

AVOCADOS

Strong demand has pushed up the market; supplies are tightening. Growers in Mexico are transitioning between spring and summer crops.

BLACKBERRIES

Prices are stable. Last week's heat has aided growth in California, but overall volume is low. Quality is very good: berries are sweet. Sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Region Supplies Quality Price The market is level. Seasonal harvesting is nearly finished in California and Mexico, but supplies from the Pacific Northwest are increasing. Quality ranges from good to very good.

BROCCOLI

Although prices are low, they may inch up later this week; supplies are starting to decrease a bit. California quality is excellent: crowns are large, texture is firm, and flavor is earthy.

CANTALOUPE

Market is steady and strong on larger fruit 9/12's and softer on the smaller fruit. Shippers are going here on the Westside and volume is in full swing, there is also fruit still out of the Arizona desert and will be finishing up by the end of the week. We expect very good volume through the middle part of October here and then will transition to the California desert to get us through until the offshore starts. We expect very good quality going forward barring any major weather issues. Quality is excellent: sugar levels range from 13 to 14 Brix.



FRESH DIRECTIONS



CARROTS

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

CAULIFLOWER

Prices are slightly lower than last week; demand is weak. Supplies are adequate.

CELERY

The market remains low, but may inch up later this week; large sizes are tightening. The Michigan season will start soon.

CUCUMBERS

EAST: The heat has ended the NC season. The weather in MI has been cool and wet and supplies out of that region are down compared to where they normally are at this time of the year. Subsequently, supplies are tight and FOB prices are higher on all sizes and grades. We need warmer weather in MI to bring on more supplies. **WEST:** Supplies continue to be tight and FOB prices are generally high but steady this week. Quality is generally good.

ENGLISH CUCUMBER

Hothouse production from growers in British Columbia and Ontario are now primary sources; also California with good availability.

EGGPLANT

EAST: The GA crop has ended and most supplies are now coming out of SC. Supplies are slightly tighter and FOB prices are a little stronger.

FENNEL/ANISE

Very light supplies continue this week.

GARLIC

No changes...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 finishing on grapes out of Nogales and also finishing up out of Coachella. We have also started here in the central valley on flames and greens as well. We will see the Coachella Valley and Nogales fruit finishing in the next day or so. There is some marginal quality left to clean up out Mexico and some Scarlett royals out of Coachella and that will do it. We have a good volume crop here in the central valley and will have good supplies through November on all colors. The overall quality on all the fruit is good and will only continue to get better as we progress through the central valley, this is an excellent time to promote 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

Tight availability in the East along with rain in Michigan is causing a delay in the early season harvest. Production volume in Southern California is steady; prices remain firm.

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

Market remains depressed on iced due to good supplies still crossing daily from Mexico. This should not change until supplies from Mexico drop. Also location production in Quebec, Ohio and Michigan are scheduled to start late next week regionally. For iceless, we are seeing steady to lighter demand with pricing remaining unchanged this week. Steady supplies from Mexico will keep iceless market at current pricing levels.

HONEYDEW

Market very strong as demand is very good, and supplies are very light out of Mexico, California and Arizona deserts and will continue to be so as Mexico is finishing up and the desert regions are going to finish this week. We are starting in a very light way here in the central valley and will continue to increase volume each week but supplies will be tight and the market will continue to be strong except on very small fruit which is what we are seeing as we get started here on the Westside. The overall quality is excellent and we will have good supplies through mid-October and then transition back to the desert region. Sugar levels range from 11 to 13 Brix.

KALE (GREEN)

Kale supplies are excellent and will remain so for the next several weeks. Quality and appearance continues to be very nice with bunches are averaging 12-14" in length with dark green color.



FRESH DIRECTIONS



KIWI

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

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 each week going forward and Mexico (starting now but better volume in the next 2-3 weeks fruit will hopefully carry us until we start Dist. 3 the California Arizona desert region around the first of September. We will be battling the demand exceeds supply situation probably through August. The overall quality is fair with some lots showing some weakness due to lack of water and also some high color. Sugar levels range from 6 to 8 Brix.

LIMES

The market is weak; supplies are abundant. Quality is excellent: flavor is tart, color is deep green, and skins are smooth.

GREEN LEAF/RED LEAF LETTUCE

The market is steady to slightly lower than last week; stocks are sufficient. Overall quality is very good, but insect pressure and mildew are occasional issues.

ICEBERG LETTUCE

Weak demand is holding prices level to slightly lower than last week.

ROMAINE LETTUCE

Romaine will be normal this week. Demand is steady. Some mildew and light fringe burn.

ROMAINE HEARTS

Overall supplies will be normal this week. Light insect pressure. Quality is good.

MANGOS

Quality is very good now, and all coming out of Mexico and loading in Hidalgo, TX and Nogales AZ. Sizes will be trending more on the larger size with smaller fruit, 10ct and up, a little shorter. Supplies and quality are good with steady pricing.

NAPA

Quality is good, and supplies are plentiful.

ONIONS

Heavy rains over the July 4th weekend is causing supply issues in New Mexico. Suppliers are extremely short on Super Colossal and Colossal yellows for the rest of the week. There are some growers who have some fields that they will be getting into on Friday that will help fill demand. It will be next week before most suppliers are back to normal production. This weather front has affect all the onion sheds in New Mexico and is the primary catalyst for the increase in FOB pricing. I expect the market it move upward again at weeks end, prices won't stabilize till next week sometime.

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 11 to 12 Brix.

PARSLEY (CURLY, ITALIAN)

Plentiful supplies on both curly and Italian parsley this week. Overall appearance is very nice.

GREEN BELL PEPPER

EAST: The market remains active as supplies continue to be tight. Quality continues to be variable due to the heat and rains. FOB prices remain high but generally steady as suppliers continue to hunt for good quality. We look for market conditions to improve sometime next week when better volume will start to come out of new fields. **WEST:** Supplies are tighter again this week and FOB prices are up again on all sizes and grades especially choice grade.

JALAPEÑO PEPPER

EAST: Supply able to cover demand causing FOB prices to remain steady.

RED AND YELLOW PEPPER

The market will remain high for another 7 to 10 days when San Joaquin Valley volume increases. Mexican supplies (into South Texas) are limited.

PINEAPPLE

Prices are rising; a seasonal production gap will keep stocks limited through August, especially large sizes. Fruit is firm, yet juicy with tropical flavor. Sugar levels have increased to 15 Brix.



FRESH DIRECTIONS

IDAHO POTATOES

Fob pricing on large potatoes continues to slide as we approach the end of the old crop season. Supply is good and suppliers are covering all demand to this point. With that being said many are managing the loads run per day to make sure they do not gap between old and new. Some shippers in Twin Falls area should finish up in about a week and a half. Most of the Idaho Falls shippers should have old crop until around August 10th. This date can change if quality issue develop. We will start to see some of the smaller Idaho sheds finish up starting next week, it is not clear at this time if that will effect market prices.

RASPBERRIES

The market remains elevated. Expect tight stocks for the next two weeks due to seasonal harvesting transitions and poor weather. Flavor is sweet: sugar levels are moderately high, ranging from 13 to 14 Brix.

RED CABBAGE

Quality has been very nice with good dark color and very dense and heavy heads.

SALADS & BLENDS

The market is unchanged; raw product stocks are abundant.

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 yellowing, half leaves and occasional oversizing.

SPINACH (BUNCHED)

We are expecting steady supplies for the next two weeks. Bunches are dark green and lengths are 11-13".

SPRING MIX

The market is steady. Volume is high, but elevated temperatures are causing insect damage, mildew, early breakdown, and shortening shelf-life. Creasing and mechanical damage are issues in spinach.

GREEN SQUASH

EAST: FOB prices are up again from last week. Quality is variable. Large zukes are extremely tight as the weather in MI has slowed growth and growers are being careful to pick all product available before it grows to a large size.

WEST: Supplies are lighter and FOB prices are up compared to last week. Quality is variable.

YELLOW SQUASH

EAST: Market is active. FOB prices are up again this week as suppliers hunt for good quality product. **WEST:** Market is active. FOB prices are up over last week. Some supplies are starting to show up in WA. The Santa Maria crop should start to produce later this week.

STRAWBERRIES

The market is easing; demand is weakening. Growers have stripped plants of last week's heat-damaged berries, improving quality but diminishing size.

TOMATOES

EAST

Rounds

The Quincy and our coastal SC crops have finished up since last week's report. Growers are waiting for their Eastern Shore, VA crop to start producing which should in the next 7-10 days. Some interior SC growers have begun to produce and a few smaller growers in the mountains of NC and SC have begun with very light volume. Overall supplies are down this week causing FOB prices to be stronger on all sizes. Quality is good.

Romas

Supplies are extremely tight in the east. FOB prices are up slightly on all sizes. Quality is variable.

Grapes

Supplies have tightened up slightly again causing FOB prices to be slightly stronger compared to last week. Quality is good.

Cherries

Supplies are considerably tighter this week after being more plentiful last week. FOB prices are also considerably stronger this week as a result.

WEST/MEXICO

Rounds

All growers continue to harvest mature greens out of CA this week and temperatures have moderated. However, suppliers are still seeking quality fruit as general quality has improved from poor to only fair and quality fruit continues to bring a premium. Also, demand in the west is stronger as a larger portion of the country is having to pull from the west due to the shortage of product in the east. FOB prices are up on all sizes.



FRESH DIRECTIONS



Romas

A small gap between fields is causing supplies to be a tighter again this week with a wide variance in quality. Mature greens are being harvested in CA and a lower volume continues to cross at Otay Mesa and TX. FOB prices on quality fruit are higher. We see demand outstripping supply for the next 10-14 days at which time new fields should be in production.

Grape

FOB prices for quality product are up slightly this week. Quality is variable.

Cherries

Quality continues to be sub-par. FOB prices on quality product are up slightly again from last week.

TREE FRUIT

The market is unchanged; supplies are adequate despite strong demand. Although quality is very good, size is slightly smaller than last year's crop. Fruit is sweet and juicy. Nectarine sugar levels range from 10 to 12 Brix, while peaches vary from 9.5 to 11 Brix and plums from 12 to 16 Brix.

WATERMELON

The market is inching down; volume is rising. Expect comparable prices throughout the summer. Quality is excellent: sugar levels range from 10 to 12 Brix.