

# FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending July 23, 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	Good	↓
Romaine Lettuce	Moderate	Good	↓
Romaine Hearts	Moderate	Excellent	↓
Cucumbers	High	Good	↔
Green Beans	High to Extreme	Good	↑
Green Bell Peppers	High	Good	↑
Red Bell Peppers	Moderate to 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	Moderate	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	Fair	↔
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 23, 2015



## MARKET OVERVIEW

Supplies continue to be on the lighter side this week on Romaine. Romaine Hearts and Iceberg are average. Supplies are above average on Green and Red leaf lettuce. Broccoli supplies have tightened considerably this week and Cauliflower supplies are on the lighter side. The Lemon market remains very tight, and we are seeing very few 140's and larger. The asparagus market remains steady. Supplies on all herbs are steady. The Berry market remains strong. The fennel market remains tight, and prices are high. We are hoping for an improvement soon. Garlic continues to remain tight. The banana and pineapple market has been affected by the rain in Costa Rica and we are seeing a supply shortage.

## APPLES AND PEARS

Great buying opportunities continue on red delicious. There is good movement on golden delicious. Galas and goldens are harder to come by. Several shippers are finished packing Galas. Reds, grannies and golds should last until new crop begins in the fall, with reds overlapping. Overall, quality remains good. Cherry demand is quite strong. Quality is mixed as temps continue to be in the 100-110 range. Season should end by next week. Anticipate harvesting new crop Bartlett pears first week in August. California Bartlett now in production.

## ARTICHOKES

Good volume is expected to continue this week. Most of the volume this week is expected to be 12's, 18's, and 24's. Quality is excellent. Prices are steady. Volume is expected to be good for several weeks so ad pricing is available.

## ARUGULA

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

## ASPARAGUS

Mexico has light supplies and market is getting stronger due to demand exceeding supply. Peru has more volume, but fob's are also higher which is also strengthening the market.

## AVOCADOS

First supplies of new crop should start arriving by the end of the week. Expect pricing on 48s/60s to start downward trend early next week.

## BLACKBERRIES

Blackberries will continue to be tight this week. North Carolina almost tripled their estimate over the weekend; fruit being transferred to Manfredi. California supply continues to slowly

increase, but won't see any significant volume ramp up until late summer.

## BLUEBERRIES

Georgia, North Carolina and California are starting to wind down, but Munger Delta production still has plenty of fruit to move.

## BROCCOLI

Quality is good, and supplies are plentiful.

## BROCCOLI

Supplies of Broccoli have lightened up considerably; appear to be very light all week. Summer time varieties are coming in right on time as previous varieties were early. There had been some issues with a bit of hollow stem, but fields look to be cleaning up.

## CANTALOUPE

Market very good as we going in full swing on the Westside, the overall demand is excellent and overall quality is very nice with excellent sugar and internal color and a straw to green cast and a full slip. Expect excellent quality barring any major weather issues and we will have good volume here through mid-October and then transition to the desert. Excellent time to promote Cantaloupe.

## CARROTS

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

## CAULIFLOWER

Cauliflower supplies will be on the lighter side this week. The market has firmed up as a result. Quality remains very nice and heads are bright white and heavy.



# FRESH DIRECTIONS



## CELERY

Slightly below average supplies this week with better demand and steady market. Quality is excellent; very large and meaty shanks, dark green color and 60-61 lbs. weights.

## CUCUMBERS

**EAST:** FOB prices generally steady from last week. A lot of fruit is on the MI vines and as soon as the weather breaks, additional supplies should start to cause FOB prices to fall.

**WEST:** FOB prices generally steady. Seeing some quality issues (yellowing) in the domestic product. Quality is better out of Baja.

## ENGLISH CUCUMBER

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

## EGGPLANT

**EAST:** Strong demand is putting upward pressure on FOB prices. Quality is generally good. **WEST:** FOB prices generally steady. Seeing some quality issues (yellowing) in the domestic product. Quality is better out of Baja.

## FENNEL

Due to light supplies the last few weeks demand should remain very good.

## 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 with supplies starting to increase out of the central valley and Mexico and Coachella done for the most part. The green grape market is very strong but should start to ease up as we get into better volumes in the next few weeks. The reds are in better supply with very good demand as overall quality is excellent with great sugar and color and crunch. We will have grapes here in the Central valley through November until we see the Chilean start to arrive. Excellent time to promote grapes.

## GREEN BEANS

Continued tight availability in the East and West. Prices have advanced in California and remain well above average in North Carolina and Virginia.

## GREEN CABBAGE

Green cabbage supplies from central California will be very heavy for the next few weeks. Head size is medium to large, and weights have been up to 60 lbs.

## GREEN ONIONS

Market onions have slowed down, with a chance of some supplies next week. The market is still flat. Quality is very good, and all packs are available.

## HONEYDEW

Market very strong with demand exceeds supply on some sizes, we will start to see better volume in the coming weeks but acreage is down a bit so market should stay fairly steady. The overall quality is excellent with a nice green to cream cast and excellent sugar and internal color. We will have good supplies through mid-October and will then transition to the California desert.

## 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 averaging 12-14" in length with dark green color.

## KIWI

Import volume from Chile has slowed, as growers have made the transition from fresh harvest to controlled atmosphere storage fruit. Availability will be tight through the remainder of the season. The California harvest will begin in October, however domestic growers are looking at a 30 percent crop loss, due to hail that damaged the crop in the Northern San Joaquin Valley during December, 2014.

## LEMONS

Market very strong on all sizes and demand exceeds supply as we are going out of Dist. 2 and seeing more and more Chilean starting to arrive and we will hopefully see things start to settle and should not see prices get much higher as we see better Chilean volume and also Mexico should start in the next few weeks with some good volume which will really help out the supply situation. The overall quality is fair to good with some of the dist. 2 fruit showing some weakness and high maturity.



# FRESH DIRECTIONS



## GREEN LEAF/RED LEAF LETTUCE

Supplies are well above average this week and next week on green and red leaf. Quality is very good showing little to no defects. Cartons are 24-26 lbs. with each head at 11-12".

## ICEBERG LETTUCE

Average supplies continue for us this week with an average amount of 30's. Quality is generally good although we are seeing some insect damage and Sclerotinia in almost all lots. Prices are already low and should remain steady to lower this week.

## ROMAINE LETTUCE

Supplies will be below average this week but based on slower movement there shouldn't be any issues getting orders out in a timely manner. Quality remains good overall with minimal fringe burn, if any at all. Sizing is good at 38-40 lbs. per case. Each head should be 10-12" long.

## ROMAINE HEARTS

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

## LIMES (PERSIAN)

Prices are at low point for the season. Only inclement weather in Mexican growing regions will affect crop for now.

## 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

Market has firmed up. This is primarily due to rain in New Mexico, causing added pressure on the California sheds to keep up with demand. Fob's are likely to remain firm into next week until there are more supplies available out of both California and New Mexico.

## ORANGES

Market steady with good demand across the board, the overall quality is good but with our hot temperatures we are starting to see some re-greening so you will see some green tinge around the stem and bloom end, the interior color and sugar are excellent. There are some Chilean navels available as well but prices are fairly strong. Expect good volume of Valencia's through August and then we will probably see things get

a little tight but will have enough fruit to get us through until we start navels around the first of November.

## PARSLEY (CURLY, ITALIAN)

Plentiful supplies available 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. Rains in TN and MI are delaying harvest. FOB prices up slightly from last week on all sizes and grades.

**WEST:** Low field yields are causing supplies to be tight. Slight upward pressure on FOB prices compared to last week.

## JALAPEÑO PEPPER

**EAST:** Supply and FOB prices are steady. Quality is good.

**WEST:** Market steady. Quality is good.

## RED AND YELLOW PEPPER

Prices are starting to ease; California supplies are increasing. Mexican volume (into South Texas) is low.

## PINEAPPLE

The market is up. Supplies will remain tight through late August/early September due to a seasonal harvesting gap. Fruit is firm, yet juicy with tropical flavor. Sugar levels have increased to 15 Brix.

## IDAHO POTATOES

FOB's on larger sizes are softening. Many sheds looking to move 40ct through 70ct most likely because of the huge pricing difference between larger and smaller sizes. Washington is probably having an effect on the Idaho FOB's. Pricing on larger sizes from Washington have dropped significantly this week. We suggest buyers stay light on the larger sizes until the situation stabilizes.

## RASPBERRIES

We are seeing relief in the raspberry market. There remains a temporary interruption due to a gap in varietal shifts. The cool weather in May and June delayed the volume expected. Shippers are unable to fill orders in full; this shortage will continue through July but is improving.

## RED CABBAGE

Red cabbage is plentiful this week as weather remains nice and growth has been steady. Quality has been very nice with good dark color and very dense and heavy heads.

## SALADS & BLENDS

The market is level; stocks are abundant.



# FRESH DIRECTIONS



## SNOW AND SUGAR SNAP PEAS

Snow peas and sugar snaps are still in good demand with good supplies (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 week. Bunches are dark green and lengths are 11-13".

## SPRING MIX

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

## GREEN SQUASH

**EAST:** FOB prices are steady from last week but more supplies later this week should begin to put downward pressure on these prices.

**WEST:** FOB prices generally steady from last week. Quality is variable.

## YELLOW SQUASH

**EAST:** Supplies remain extremely tight causing FOB prices to remain relatively steady at last week's high levels.

**WEST:** Supplies remain relatively tight. FOB prices generally steady from last week.

## STRAWBERRIES

California remains good this week in Watsonville/Castroville/Salinas for fresh production. Varieties in the North remain the same; mostly producing Monterey, with some Albion and San Andreas.

## TOMATOES

### EAST

#### Rounds

FOB prices are higher on all sizes, especially on the 6x6s and 6x7s, this week as supplies are tighter. Coastal SC crops are finished for the season. Our VA Eastern Shore crop started this week but, as previously reported, yields are down this year on that crop. Western SC and the mountains on NC and TN are other eastern producing regions but most growers are experiencing harvesting gaps lasting several days. We predict that supplies will remain tight for this time of year for the next couple of weeks.

## Romas

Supplies continue very tight in the east. FOB prices are steady on the larger romas and down slightly on the medium size. Quality is variable.

## Grapes

Supplies are generally steady with only slight movement in FOB prices from last week. Quality is good. VA is major sourcing region.

## Cherries

Supplies remain tight. FOB prices up slightly from last week. Quality generally good.

## WEST/MEXICO

### Rounds

Tight supplies in the east are putting heavy demand on the west. FOB prices are up several dollars on all sizes of mature greens. Quality has improved over previous weeks. Vine ripers continue to cross at Otay Mesa and Texas.

## Romas

Supplies continue from CA and crossings at Otay Mesa. Crossings also continue at TX. Demand is good. FOB prices are down a couple of dollars on all sizes.

## Grape

FOB prices are down slightly on bulk and steady on flats. Quality is variable.

## Cherries

FOB prices down while quality is extremely variable.

## TREE FRUIT

Not much has changed with Tree Fruit. Between the heat and the volume there continues to be excellent buying opportunities to promote tree fruit at the BEST delivered prices of the year. The sizes of Yellow Peaches and Yellow Nectarines are peaking on larger sizes as well, although volume on Nectarines is down slightly. White Peaches and White Nectarines are the best quality and sweetness of the season. Good supplies of Black Plums.

## WATERMELON

The Watermelon market is improving. It will continue to get better into next week. Quality out of all areas is very nice.