

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending August 21, 2015



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



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MARKET OVERVIEW

There is a widespread quality issue with many items out of the Salinas Valley due to the hot weather. Plantings are down due to the drought and weather has severely impacted quality. Spring Mix, Spinach, Arugula, and Cilantro are all products that are starting to experience adverse effects from the weather. These products specifically thrive on a significant gap between daytime and nighttime temperatures as an important part of their growth; without this the last several weeks, the quality and supply of these products are starting to struggle. We will keep you posted on the extreme markets as much as soon as we hear anything. Supplies are tight on blueberries and strawberries. Raspberries are plentiful. The asparagus market remains steady. Mexico is light on product, still seeing limited numbers on jumbo and XL. Supplies on all herbs are good, except cilantro. Garlic continues to remain tight. The banana and pineapple markets are much more stable. Peppers and squash are tight.

WASHINGTON APPLES AND PEARS

There are still some great buying opportunities on 100 and larger red delicious, however, prices are firming. Movement is reported strong. Back to school has already started in parts of the country. Expect higher demand on small sizes. Galas are just about done with many ship-pers. Reds, grannies and golds should last until new crop begins in the fall, with reds overlapping, quality remains good. New crop Galas & Ginger Golds have started, then grannys and goldens towards the end of August. Wash-ington & Hood River bartletts are available along with California Bartletts.

ARTICHOKES

Average volume is expected this week with most of the volume expected to be 12's, and 18's. Quality is excellent, and prices are steady. Volume is expected to be good for several weeks so ad pricing is available on some sizes.

ARUGULA

We are seeing extremely low volume, poor quality and strong demand.

ASPARAGUS

The market is high. Harvesting will shift from mainland Mexico to the Baja region in one to two weeks; prices should ease by mid-September. Peruvian supplies are also limited.

AVOCADOS

Pricing is steady on 40s and larger. 48s are dealing heavily. Prices are good and quality is good.

BANANAS

Supplies are much better, and quality is good.

BLACKBERRIES

The market is rising. Yields are being reduced by more hot, humid weather conditions. Quality is average: berries are sweet. Sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Market is very tight. New Jersey is winding down quickly. Oregon, British Columbia and Canada are now into mid and late season varieties and packing Duke and Draper from storage. It will be an extremely tight week in all growing regions.

BOK CHOY

Quality is good, and supplies are plentiful.

BROCCOLI

Broccoli supply has improved this week. The warmer weather has pulled product forward but still not heavy on Broccoli by any means. We continue to stay aggressive on harvest to make sure of the best possible product. Failing to cut a field one day versus the next could result in subpar quality.

CANTALOUPE

Market steady and strengthening as demand has picked up and we are expecting some cooler temperatures that will slow down harvest but will really help color sugar and overall fruit strength. We are peaking on larger fruit but with the cool down over the next 10 days we will start to



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see better supplies of smaller fruit. The overall quality is excellent with nice internal and external color and fruit is eating like candy. We expect to have good supplies here on the Westside through mid-October and then we will transition to the desert for the fall melon deal.

CARROTS

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

CAULIFLOWER

Cauliflower seems to be readily available but lighter in Salinas. We should remain light until the end of the week. Quality should remain strong with nice white, dense flower.

CELERY

Celery supplies are average in Salinas and Santa Maria this week due to bug and disease pressure keeping yields low. Prices are trending upward. Michigan is seeing normal production.

CILANTRO

EXTREME MARKET. There is a Cilantro ban from Central Mexico. The FDA just started the Import alert banning all the Cilantro from Puebla Mexico. The import alert was taken into effect after the Center for Disease Control and Prevention (CDC) and state public health officials have identified annually recurring outbreaks (in 2012, 2013, and 2014) of cyclosporiasis in the United States which have been associated with fresh cilantro from the state of Puebla, Mexico. There is currently another ongoing outbreak of cyclosporiasis in the United States in which both the Texas Department of State Health Services and the Wisconsin Department of Health Services and the Wisconsin Department of Agriculture, Trade and Consumer Protection have identified cilantro from the Mexican state of Puebla as a suspect vehicle with respect to separate illness clusters. We do not buy from this region, but please be aware of this issue. Due to this issue we are seeing a very tight market in CA. Prices are high and we are seeing yellowing and decay.

CORN

The market has been active on corn. Quality is good.

CUCUMBERS

EAST: MI is main sourcing area but market continues to be fragmented. Lighter supplies are causing upward movement in FOB prices. Quality is widely variable but good quality can be found.

WEST: FOB prices have moved off the bottom and are higher this week. Quality is variable.

ENGLISH CUCUMBER

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

EGGPLANT

EAST: Fancy grade generally lower and choice grade is steady this week. Quality is generally good.

WEST: As predicted last week, supplies have increased which has put downward pressure on both fancy and choice grades.

FENNEL

Supplies for the week will be slightly over average. Demand continues to be decent, but we should have adequate supplies throughout the week.

GARLIC

We will not know where we will be with garlic for another few months due to the weather in California. The winter didn't get cold enough and the summer was too hot, so the bulbs on the garlic have not bloomed. We will be watching this weekly as the crop is very behind schedule.

GINGER

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

GRAPES

Market steady and very strong on red seedless as some of the very southern regions were hit by 1" of rain that caused some significant damage on flames about 10 days ago. We will be harvesting flames for the next 2-3 weeks and will also start crimsons and scarlet royals in the coming week so supplies will start to increase on red seedless. We are currently packing Thompsons, Princess and sugarones for green seedless and should have descent volumes of greens. The overall quality is fair to good with some erratic sizing due to the water situation, the sugar is very good and we are going to experience some cooler than normal nights over the next 10 days which will really help with color, sugar and strength of the fruit. We will have good supplies through November barring any major weather issues.

GREEN BEANS

Prices have firmed in the East, with improved availability and lower prices in the West. The spread in the price premium for California beans, compared with beans in the East, has narrowed considerably.

GREEN CABBAGE

Supplies are very heavy for the next few weeks, and sizing in the fields has been very large, with weights up to 60 lbs.



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GREEN ONIONS

Iced: Due to decent supplies crossing into CA from Mexico last week, coupled with good supplies still being produced in local Eastern growing areas, iced green onion market remains depressed. With August being the hottest month of the year in the Mexico growing areas, there is a chance current volume from Mexico could reduce slightly the next few weeks.

Iceless: The market is still seeing decent movement and steady pricing mostly due to pre-committed contracts. Supplies from Mexico are somewhat steady this week, but could see reduced volume next few weeks due to high temps the month of August.

HONEYDEWS

Market is very strong due to excellent demand and less overall acreage in the ground. We will see prices stay firm probably through mid-October due to lighter overall volume. The overall quality has been excellent with nice firm clean exterior and excellent sugars. We are also peaking on larger fruit and small fruit is very hard to come by. We will transition to the desert fall melon deal around middle October.

KALE (GREEN)

Demand is steady, and supplies are good. Quality is very nice but with some thicker ribs present due to the warmer weather both day and night.

LEMONS

Market is steady on California fruit and has eased a bit due to the influx of Chilean arrivals and Mexico starting in a light way. The first of the Mexican fruit we have seen looks pretty rough but growers are telling us we will see better fruit in the next few weeks. We will start crossing some of our fruit next week and will keep you posted on overall quality. The California fruit quality is fair to good with fruit being weaker in some areas as the lack of water is taking its toll on the strength of the fruit. The Chilean fruit has been pretty nice, some containers have arrived with a fair amount of decay but once we run them and repack the fruit looks very good. We should not have tough August that we have had the past two years but fruit will stay strong, we anticipate starting new crop Dist. 3 (California Desert) around the first week of September and that crops looks to be about 20% lighter than last year.

GREEN AND RED LEAF

Wind burn and fringe burn are quality issues that we are seeing in leaf product. Quality is fair.

ICEBERG LETTUCE

EXTREME MARKET. All growers in the industry are dealing with quality issues (fringe burn, seeders, internal burn) as a result of the erratic weather patterns, we have been enduring the last few months in the Salinas Valley. As a result, we are expecting extremely light supplies, poor quality, consisting of weak tip, internal burn, seeders, insect damage and mildew. Expect high prices for the next 2-3 weeks on Iceberg Lettuce and Romaine Lettuce.

ROMAINE

EXTREME MARKET. Supplies will be well below average this week on romaine. Some russet spotting on romaine is starting to appear; showing on 1-2 heads per box. Sizing is expected to be from 38-39 lbs. and 11-12 inches long this week. We are seeing quality issues and lack of product due to weather.

ROMAINE HEARTS

Supplies for the week will be steady. Demand is good. We continue to fight some quality issues of seeders and fringe burn. This is a result of the warmer days and rapid growth. Harvesting is seven days ahead of schedule. Despite these issues, we are confident the product that is shipping is great quality.

LIMES (PERSIAN)

Pricing is up this week; supplies remain in line with movement.

MANGOS

Supply is getting tight, and prices are high.

ONIONS

There are still plenty of yellow onions available out of multiple states. Washington is still short on super colossal and colossal yellows but hopefully that will change soon. Idaho has also begun production and has availability on all sizes and colors. California is winding down with mostly just yellow varieties available. Some shippers are utilizing New Mexico for some of their manifests but that will be changing very quickly. Expect most shippers to be done running around August 20th but be able to ship product until Monday the 24th. After that most everything will go to Idaho.

ORANGES

Market strong and steady on all sizes and grades and will continue to be so through October until we start New crop California navels. The overall quality is good to fair with some re-greening on the bloom end and stem end due to our hot temperatures and we are gassing some of the fruit to bring the color back if the block is heavy green, also please keep in mind this fruit we are



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harvesting is 17 months on the tree and we are seeing heavy scars and fruit is not real firm in some blocks. The internal condition is excellent with great sugar and juice content. The upcoming navel crop looks good at this time and by the first estimate looks to be similar to last year's crop size, we will keep you posted as get closer.

NAPA

Quality is good, and supplies are plentiful.

PARSLEY (CURLY, ITALIAN)

Supplies of both curly and Italian parsley are steady this week. Overall appearance of both is excellent.

GREEN BELL PEPPER

EAST: Good supplies continue and FOB prices are slightly weaker this week. MI and NJ are current major sourcing areas but local deals continue.

WEST: Sourcing continues to be out of Baja, CA and WA.

JALAPEÑO PEPPER

EAST: FOB prices are steady compared to last week. Quality remains good.

RED AND YELLOW PEPPER

Prices are up. Supplies will remain tight until the week of August 24 when growers start harvesting new regions.

PINEAPPLE

The market is steady to slightly lower than last week. Large sizes are limited; small stocks are adequate. Fruit is firm, yet juicy with tropical flavor. Sugar levels are high, averaging 15 Brix.

IDAHO POTATOES RUSSETS AND REDS

New crop harvest continues and thinks are looking very good. There has been a nice mix of all the #1 sizes making it easy to fill mixer manifest as well as straight load volume with less notice. We still have a long way to go before we finish but so far harvest has yielded some very nice quality. #2's will continue to be an issue throughout the Norkotah harvest as we continue to fill orders with #1 product as needed. The Idaho reds have been outstanding so far, great color, nice netting....very smooth spuds.

RASPBERRIES

As in recent weeks, there will be plenty of raspberries to sell in both Watsonville and down south. It looks as if the California peak is coming on earlier than originally forecasted. As of now, it is scheduled to have our best ever availability this year.

RED CABBAGE

Red cabbage volume will remain steady for the next week. Quality has been great with very good weights, sizing and color.

SALADS & BLENDS

Prices are unchanged. Although raw product stocks are plentiful, heat-related defects are decreasing shelf-life in some lots.

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)

Baby Spinach and Clipped Spinach supplies are in an Extreme Market due to the weather in Salinas 10 week averages are in effect. Quality is fair with some wind and heat damage, some thicker stems and half leaves. Prices are high.

SPINACH (BUNCHED)

Extreme Market. Numbers are below average due to weather and yields. Demand is very strong and should remain so for the next 10 days.

SPRING MIX

Extreme Market. There have been warmer days and nights in some growing locations having and extreme impact on the quality of spring mix. We are seeing huge pro-rates and price increases. Temperature control is extremely important during these times.

GREEN SQUASH

EAST: FOB prices are generally steady with downward pressure.

WEST: FOB prices generally slightly higher. Quality is variable.

YELLOW SQUASH

EAST: As it has been true most of this summer, supplies remain tight and FOB prices remain relatively steady at last week's high levels. However, we continue to see some downward pressure. Quality remains variable.

WEST: FOB prices generally slightly higher. Supplies are generally tighter this year due to decreased plantings due to the water shortage in the west. Supplies will remain generally tight through August. Quality is variable.



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STRAWBERRIES

California strawberry volume will continue to significantly decline this week. Warmer than normal evening and night time temperatures, paired with gapping fields, is going to cause volume to be much lower than seen in the past few weeks. The market will be hot, as this is the case for most everyone in the industry. Due to this, berry quality is struggling. Sizing has come down, and the fruit is on the darker/softer side. Varieties in the North remain the same; mostly producing Monterey, with some Albion and San Andreas. Prices are high, quality is poor and we are seeing shortages of product.

TOMATOES

EAST

Rounds

FOB prices are generally steady this week on all sizes but supplies continue to tighten and we see upward pressure for the next week or so. Our longer term outlook for the rest of the summer is for tighter than normal supplies and higher than normal FOB prices for this time of year. Our VA Eastern Shore crop is progressing to 2nd and 3rd pickings. Local western SC and NC/TN fields continue to produce along with NJ and AL. Quality continues to be generally good.

Romas

Supplies are tighter and FOB prices are up on all sizes. Quality is variable.

Grapes

Wide range of quality and FOB prices being reported. Quality product is demanding slightly more again this week.

Cherries

Supplies continue to be extremely tight as they have been all summer. FOB prices are currently steady but there is upward pressure. Quality becoming more variable.

WEST/MEXICO

Rounds

Sizing and quality has dropped off from last week. FOB prices are currently steady from last week on all sizes of mature greens coming out of CA but there are several upward pressures being applied and we expect prices to rise in the short term. This will especially be true if the east has to come west more frequently to meet demand. 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. FOB prices are generally steady on the large size and up slightly on the medium size. CA and MX quality continues to be extremely variable. We are about 3 weeks from new fields.

Grapes

As in the east, a wide range of quality and FOB prices are being reported and the better quality is demanding considerably more compared to last week. We see continued upward pressures in the next several weeks.

Cherries

Supplies continue to be tight. FOB prices are higher, especially for the better quality fruit. Quality remains variable.

TREE FRUIT

The market is stable. Nectarine and peach supplies are dominated by large sizes. Quality is very good: 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

Prices are low, but expected to climb as Labor Day nears. Current supplies are ample. Quality is excellent: fruit is sweet and juicy. Sugar levels range from 11 to 13 Brix.



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