

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending August 28, 2015



COMMODITY	PRICE	QUALITY	PRICE TREND
Mexican Avocados	Moderate	Good	VARIES BY SIZE
Blackberries, Blueberries, Raspberries	Moderate	Good	↔
Strawberries	High	Good	↔
Grapefruit	Moderate	Good	↓
Lemons	High	Good	↓
Limes	Moderate	Excellent	↑
Pineapples	Moderate	Good	↔
Oranges, Navels	Some CA/Chilean Navels	Good	↑
Green & Red Leaf Lettuces	Moderate	Fair	↔
Iceberg Lettuce	High	Fair	↔
Romaine Lettuce	Moderate to High	Good	↑
Romaine Hearts	Moderate to High	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 to High	Good	↔
Parsley (Curly & Italian)	Moderate	Very Good	↔
Baby Spinach	Low	Good	↓
Cauliflower	Moderate	Fair	↑
Celery	Moderate	Excellent	↔
Peeled Garlic	Extreme	Good	↔
Green Cabbage	Moderate	Excellent	↔
Green Onions	Moderate	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	↔



FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending August 28, 2015



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. We will keep you posted on the extreme markets as much as soon as we hear anything. Expect all berries to have some issues; very tender, soft and bruised in the clamshell. These issues are going to be prevalent through the week as we work our way out of this fruit. Also, strawberry sizing will be affected. 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 market 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 shippers. 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. Washington & Hood River bartletts are available along with California Bartletts.

ARTICHOKES

Average volume is expected this week with most of the volume expected to be 18's, 24s and 30s. Quality is excellent, and prices are steady. Volume is expected to be fair for the next several weeks. Ad pricing is available depending on size and volume.

ARUGULA

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

ASPARAGUS

Mexico has light supplies. Peru has decent volume, still limited on larger sizes, quality is good.

AVOCADOS

Pricing is steady on 40s and larger. 49s - 60s are still dealing and smaller is increasing in price.

BANANAS

Supplies are much better, and quality is good.

BLACKBERRIES

Blackberries have been making a quick comeback this week. California is off and running now. We will continue to see this volume increase little by little each week.

BLUEBERRIES

Michigan continues to be tight this week as the start of heavy diversion to storage of fresh Elliott's begin. British Columbia, Canada middle of peak Elliott harvest. Oregon in last rounds of harvest with late season varieties.

BOK CHOY

Quality is good, and supplies are plentiful.

BROCCOLI

The extreme heat has caused many shippers to fall behind in fields, thus resulting in quality issues throughout the industry. We should see supplies remain light as we battle through these adverse conditions.

CANTALOUPE

Market steady with good demand and steady supplies but keeping up with inventories and nobody has any huge volume on the floor. We are peaking on 12's and the larger fruit is keeping very strong. 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.



FRESH DIRECTIONS



CAULIFLOWER

The extremely hot days have brought some fields forward while others remain steady. As a result, numbers will remain average for the next couple of weeks. Some shippers have reported losing acreage to the heat and the market has perked up slightly as a result.

CELERY

Demand is fair. 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.

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. We do not foresee better quality until the NC fall crop begins around the 1st of September. Until that time, we recommend that inventory levels be kept close due to quality concerns.

WEST: FOB prices are generally steady. Quality is variable.

ENGLISH CUCUMBER

Hothouse production in various districts is steady.

EGGPLANT

EAST: FOB prices of fancy and choice grades are steady this week. Quality is generally good.

WEST: Supplies have tightened back up this week which has put upward pressure on FOB prices.

FENNEL

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

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 and green seedless. We will be harvesting flames for the next 2 weeks and will also start crimsons this week and scarlet royals next week so supplies will start to increase on red seedless. We are currently packing Princess for green seedless and will start Autumn Kings in the coming weeks. 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 warmer than normal days over the next week which could slow harvest, sugar and strength of the fruit is excellent. We will have good supplies through November barring any major weather issues.

GREEN BEANS

Prices continue to move higher in North Carolina and New York, while the market in California has eased, erasing any price premium compared to Eastern districts. Availability will improve by mid-September.

GREEN CABBAGE

Supplies are average. Weights and sizing will still be very good, with cartons over 50 lbs. and showing dark green color.

GREEN ONIONS:

ICED: The market is showing slight improvement in pricing, due to past weeks lighter supplies crossing from Mexico into California. We should most likely see a slow but steady rise in market due to severe heat along the Mexico border which should slightly reduce yields in the coming weeks.

ICELESS: The market remains steady and unchanged with many sales from contracted and or pre-committed pricing. There could be a slight price increase in the coming weeks due to extreme heat and humidity in the Mexico growing region.

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 plentiful. Quality is very nice but with some thicker ribs present due to the warmer weather both day and night.



FRESH DIRECTIONS



KIWI

Late-season controlled atmosphere kiwi from Chile is in good supply. The California season will begin early this year (mid-September); a smooth transition is in the forecast.

LEMONS

Market is steady on California fruit and has eased a bit due to the influx of Chilean arrivals and Mexico starting. The first of the Mexican fruit we have seen looks pretty rough but growers are telling us we will see better fruit next week. We will start crossing some of our fruit this 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 is very nice, 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

We are expected to have good supplies on red this week; while very light on green. Sizing and quality remain strong across the board. Green is expected to be 24-25 lbs. and 10-11 inches long. Red is weighing 23-24 lbs. and is 10-11 inches. Quality is very clean on all the leaf items with good coloring this week.

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.

ROMAINE

Demand is very good. Supplies are expected to be above average this week on romaine. Good supplies are coming in daily. We are starting to see some light fringe burn and pinkening on our romaine, but other than that quality is expected to be good overall. Sizing this week is expected to be from 36-38 lbs. and 11-12 inches long.

ROMAINE HEARTS

Supplies for the week are steady. Due to the warm week-end, we are continuing to fight some quality issues of seeders and fringe burn.

LIMES

Expect higher prices and tighter supplies, especially 175- to 200-count fruit, for the next three to four weeks. Discoloration/browning is a minor issue.

NAPA

Quality is good, and supplies are plentiful.

ONIONS

New Mexico is done for the most with the exception of straight load Yellow Jumbos at a deal. There are still some yellows in California as well but that's about it. Most shippers will primarily be shipping from Idaho Region as of this weekend. As with potatoes this crop looks very normal, good range in size and we already are seeing a nice skin develop on these onions. This market will remain steady to possibly weaker over the next 10 days.

Oranges

Market very strong and steady as demand exceeds supply on 113's and 138's both 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 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.

PARSLEY (CURLY, ITALIAN)

Supplies of curly parsley are down from last week and will remain that way for the next two weeks. Italian parsley numbers are plentiful. Overall quality on both is excellent.

GREEN BELL PEPPER

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

WEST: Good supplies continue. Sourcing continues to be out of Baja, CA and WA. Steady to downward pressure on FOB prices.

JALAPEÑO PEPPER

EAST: FOB prices are steady but with upward pressure compared to last week. Quality remains good.

WEST: More supplies available putting downward pressure on FOB prices.



FRESH DIRECTIONS



RED AND YELLOW PEPPER

The market is elevated. Growers will begin harvesting in new regions later this week, easing prices over the next few weeks.

PINEAPPLE

Although the market is steady in Costa Rica, weather challenges forced Mexican growers to end that season prematurely; new crop harvesting will start in September. Sugar levels are high, averaging 15 Brix.

IDAHO POTATOES

Idaho suppliers are wide open with harvest and consequently production on these new crop Norks. Both the Twin Falls and Idaho Falls regions are running full days and shipping into the evenings. So far there is a real nice mix of cartons sizes with the exception of 100cts and 6oz #2's. This time of year these two sku's are basically the same item. It's taking all of the suppliers daily production on 100cts to fill both the 100ct cartons and our 6oz #2 orders. This will continue to be the trend for a few weeks, possibly longer. This crop really looks nice and the size profile looks good as well, those high dollar 40's, 50's we saw won't materialize this season, at least not on Norks. We won't have a Burbank update for you for a few weeks. Overall the market trend will be steady to slightly lower over the next week or two.

RASPBERRIES

Raspberries are snug this week, out of both North and the South. Total California raspberry projection was down for the week, mostly due to heat and certain ranches declining. We have not really had a full assessment of the heat damage from the weekend so both week's estimates could continue to drop. The positive is that it is supposed to cool off in California this week.

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

The market is steady. Although raw product stocks are abundant, quality problems are decreasing shelf-life in some lots; high temperatures and humidity persist.

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 good with some thicker stems, some occasional weaker texture and half leaves.

SPINACH (BUNCHED)

Volume is below average this week; warmer weather over the last few days has allowed some fields to size up for harvest. Though with warmer weather, we are seeing a few more yellow leaves, but the crew is trying to limit that in each bunch. Overall lengths are between 9-10 inches and bunches are full with dark green color.

SPRING MIX

Extreme Market. There have been warmer days and nights in some growing locations having an 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. Quality is variable

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

YELLOW SQUASH

EAST: As it has been true most of this summer, supplies remain tight but we are finally beginning to see a slight increase. FOB prices are generally steady but with downward pressure. Quality remains variable.

WEST: FOB prices are slightly weaker as a few more supplies are available. Quality is variable.

STRAWBERRIES

California experienced extremely warm weather for this time of the year this past weekend. Watsonville/Salinas experienced record temperatures over the weekend; mid 90's and into the 100's. Overnight temperatures also were very warm mostly in the 56-64 range. Some harvesting crews didn't finish packing on Saturday due to the extremely warm weather. We expect all berries to have some issues coming out of this weekend as fruit will be very tender, soft and bruised in the clamshell. These issues are going to be prevalent through the week as we work our way out of this fruit. Also, strawberry sizing will be affected. Varieties in the North remain the same; mostly producing Monterey, with some Albion and San Andreas. Santa Maria is in clean up mode right now. They are currently picking off a few "mud" berries, with normal production to get going by the second week in September.



FRESH DIRECTIONS



TOMATOES

EAST

Rounds

FOB prices of 6x7s and 6x6s are generally steady this week but there is slight upward pressure on 5x6s as supplies remain tight. As mentioned last week, 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 finishing up. Local western SC and NC/TN fields continue to produce along with NJ and AL. Quality continues to be generally good. Quality and shelf-life of vine-ripes are variable.

Romas

Supplies continue to be tight. FOB prices are steady. Quality is variable.

Grapes

Quality product is demanding slightly more again this week. Quality continues to be variable.

Cherries

Supplies continue to be extremely tight as they have been all summer. FOB prices are currently steady. Quality continues to be variable.

WEST/MEXICO

Rounds

Larger sizes continue to get tighter and those FOB prices are up slightly. Prices are steady on the 6x7 size. CA field temperatures have been in excess of 105 for the past 3 or 4 days. Cooler weather is forecast by this weekend. Demand continues to be strong and quality continues to be variable. Vine ripers continue to cross at Otay Mesa and Texas and are demanding higher FOB prices.

Romas

Supplies continue from CA and crossings at Otay Mesa. Crossings also continue at TX. CA and MX quality continues to be extremely variable. We are about 2 weeks from new fields.

Grapes

As in the east, a wide range of quality and FOB prices are being reported. FOB prices are generally steady from last week.

Cherries

Supplies continue to be tight. FOB prices are generally steady from last week. Quality remains variable.

Tree Fruit

Prices are unchanged. The nectarine and peach season will run through the end of this month. Plums will remain on the market through September. 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

The market is near the bottom, but will inch up now through Labor Day. Stocks are abundant. Quality is excellent: fruit is sweet and juicy. Sugar levels range from 11 to 13 Brix.



FRESH DIRECTIONS

