

# FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending October 16, 2015



COMMODITY	PRICE	QUALITY	PRICE TREND
California Avocados	END OF SEASON		
Mexican Avocados	Moderate	Good	VARIES BY SIZE
Blackberries & Blueberries	Extreme	Good	↔
Raspberries	High	Good	↔
Strawberries	High	Fair	↔
Grapefruit	Moderate	Good	↔
Lemons	High	Good	↔
Limes	Moderate	Excellent	↓
Pineapples	Moderate	Good	↔
Oranges, Navels	Some CA Vals/Chilean Navels	Poor-Vals Good-Navs	↑
Green & Red Leaf Lettuces	Moderate	Good	↔
Iceberg Lettuce	Moderate	Fair	↓
Romaine Lettuce	Moderate	Good	↓
Romaine Hearts	Moderate to High	Good	↑
Cucumbers	High	Good	↔
Green Beans	Moderate to Extreme	Good	↑
Green Bell Peppers, Yellow Squash & Zucchini	Moderate	Good	↑
Red Bell Peppers	Moderate to High	Good	↑
Green & Red Seedless Grapes, Cantaloupes & Honeydew	Moderate	Good	↔
Plums	Finished		
Artichokes	Moderate to High	Excellent	↔
Arugula	Moderate	Good	↔
Asparagus & Cauliflower	Moderate to High	Good	↑
Broccoli	Moderate to High	Good	↔
Carrots, Frisee, Mache & Spring Mix	Moderate	Good	↔
Celery	Moderate	Good	↓
Fennel/Anise	High	Very Good	↔
Peeled Garlic	Extreme	Good	↔
Green Cabbage & Red Cabbage	High	Excellent	↔
Green Onions & Napa	High	Fair	↑
Kale (Green)	Low	Very Good	↔
Parsley (Curly/Italian)	Moderate to High	Very Good	↑
Snow & Sugar Snap Peas	High	Poor to Fair	↑
Spinach (Baby)	Low	Good	↔
Spinach (Bunched)	High	Good	↔
Yellow, White Onions	Moderate	Good	↓
Red Onions	Moderate	Good	↑
Round, Grape, Roma Tomatoes	Moderate	Good	↑
Idaho Russet Potatoes	Variable	Good	↔
Red & Golden Delicious, Granny Smiths, Pinks	Moderate	Good	↔
Golden Delicious, Fujis – New Crop	Higher	Good	↔
Galas, Honeycrisp - New Crop, D'anjous, Bosc Pears	High	Good	↔
Bartlett Pears	High/Moderate	Good	↔



# FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending October 9, 2015



## MARKET OVERVIEW

Extreme weather conditions (rain, heat) continue to be the dominant factors influencing quality and availability for many items. Rain in Mexico, Southern California and the Carolinas has resulted in quality issues and delays in harvesting for tomatoes, beans, cucumbers, eggplant, squash and peppers. Continued above-average temperatures continue to disrupt growth cycles, in addition to heat-related quality issues, for row crop items in the coastal districts of Central California. With the prediction of the developing El Nino, we can likely expect to see abnormal weather extremes through early 2016.

**Eastern Veg and Tomato Markets:** A past week of historical rains in the east coupled with the western fields also experiencing rains are causing markets of nearly all tomato and other dry vegetables commodities to be higher this week. Quality and shelf-life of product will be suspect until we can work through this product. All of this is occurring during a time that we typically experience a “gap” situation as we transition to fields in Florida and South Georgia. We recommend that inventories be kept as tight as possible as we work through this situation. Most tomato contracts have reached their trigger points and Act of God clauses are in effect. We do not forecast any real relief for the market until the central and southern Florida fields begin to be harvested. We expect the central Florida fields to start yielding product in mid-November and the southern fields to start during the first half of December.

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### APPLES & PEARS

Apple prices are low. New crop supplies are plentiful in both regions; stocks are dominated by 100- through 138-count sizes. Sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). Pear prices are near the bottom. The California Bartlett season will end next week. Washington fruit is ample.

### ARTICHOKES

Average volume is expected this week although supplies industry wide are low. Most of the volume this week is expected to be 12's, 18's and 24s. Quality is excellent. Most sizes are higher in price. Volume will drop as the weather cools.

### ARUGULA

Supplies of both baby and wild arugula are good. Quality is good with minimal yellowing and thick stems.

### ASPARAGUS

The market is steady. Stocks are increasing in Baja, Mexico; quality is very good. Peruvian volume is average; quality is merely fair.

### AVOCADOS

Prices are near the bottom. Mexican supplies are abundant, especially large sizes (48-count and lower). Quality is very good: moderate oil content is creating creamy texture.

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## BANANAS

Supplies are much better, and quality is good.

## BLACKBERRIES

The market is high. The Salinas/Watsonville season is winding down. The Mexican season has just begun, but volume will rise. Although quality is good, bleeding, bruising, and soft texture remain slight issues. Sugar levels range from 12 to 13 Brix.

## BLUEBERRIES

Prices are up. Domestic seasons are nearly over; controlled-atmosphere storage stocks are almost depleted. Offshore arrivals remain sporadic. Quality is good, although shriveling and softness are problems.

## BOK CHOY

Availability has tightened due to continued hot weather, causing yellow leaves and reduced yields.

## BROCCOLI

The market is elevated. Recent heat and rain have caused quality issues such as bracketing, hollow core, and knuckly heads. Mexican prices are also climbing.

## CANTALOUPE

Market strong and steady as we are finishing up on the Westside, but will have supplies through the third week of October here on the Westside. The California and Arizona deserts have started as well but supplies have been tight as volumes have not kicked in but will start to increase by the middle of next week. The first of the desert fruit has been on the larger side so smaller fruit will be on the tighter side, but by the end of next we should see a better mix of sizes. The overall quality out of both areas has been very good with high sugars and a nice clean nest with straw to green cast. Sugar levels range from 10 to 11 Brix.

## CARROTS

Availability is good for jumbo carrots in the Cuyama Valley of California, located at higher elevation southwest of Bakersfield. Quality is good.

## CAULIFLOWER

The market is climbing. California quality is very good.

## CELERY

Prices are stable; volume is average. Demand will increase due to Canada's Thanksgiving, but the market shouldn't be affected. Stalks are firm and zesty.

## CORN

Late-season corn (yellow, white) from California is in limited supply; prices are at extreme levels.

## CUCUMBERS

**EAST:** FOB prices are generally steady to higher. Both the eastern NC and southern GA fields have experienced rain this week. Quality has been good but will decline due to the rains.

**WEST:** FOB prices are steady to lower this week. Quality is variable.

## ENGLISH CUCUMBER

Hothouse availability in various districts in the U.S., and Canada is steady.

## EGGPLANT

**EAST:** FOB prices are up slightly but are still at low levels. Quality is generally good.

**WEST:** Supplies have tightened and FOB prices are higher this week. We continue to see some quality issues at crossing points.

## FENNEL

Supplies for the week will be average. Demand continues to be decent and should increase in the coming weeks.

## GARLIC

We are now about 80% done with our harvest, and unfortunately, the situation has not improved (actually slightly worsened). 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

Chinese ginger is in good supply, offered at a substantial discount compared to ginger from Brazil.

## GRAPES

The market is steady with good supplies of fruit on red and tighter on green, the overall quality is excellent and sugars are high and the fruit is eating like candy. The overall fruit strength is very good and we expect to have fruit through the middle to end of December barring any major El Nino activity. This is an excellent time to promote California table grapes. Green seedless sugar levels range from 17 to 18 Brix; red seedless levels range from 22 to 24 Brix.

## GREEN BEANS

A slight increase in supply has developed in California, however prices remain at the extreme. The Coachella Valley harvest will begin in mid-October; until then, supplies in the West will remain tight. The harvest in Georgia is underway; prices have advanced from bottom levels.





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## GREEN CABBAGE

Green cabbage supplies remain about 20% below expected volume, due to smaller sizing and lighter weight heads in fields. Warmer weather is expected to end this week; sizing may improve next week.

## RED CABBAGE

Quality and sizing have been great, with great color and very little discoloration. Overall market is strong. Expect good supplies through the end of October.

## GREEN ONIONS: ICED

The market remains active due to light volume crossing the border. We will most likely see pricing remain well above normal for the next 10 days or until volume increases crossing from Mexico, possibly around the middle of the month. Iceless: The market remains active due to light supplies currently crossing the border. Iceless supplies should increase sometime around the week of Oct. 12th when Mexican growers fall plantings acreage increases.

## HONEYDEW

Market strengthening as we are finishing on the Westside but will have supplies for the next 2 weeks up here. The desert has started as well but supplies are on the tighter side keeping the market strong across the board. There will be better supplies out of the California and Arizona deserts next week and the weeks to follow through Middle November. Sugar levels range from 10 to 12 Brix.

## KALE (GREEN)

Demand is steady, and quality is good with some occasional yellowing present. Supplies are good.

## KIWI

The Chilean season is quickly winding down; new crop California kiwi is now available. Prices have firmed. Although heat has caused moderate damage to the crop in the Northern San Joaquin Valley, adequate production is anticipated for the upcoming California kiwi season.

## LEMONS

Market steady and strong as we have started Dist. 3 but it has been a slow start due to weather and color. We will start to ramp up volume towards the end of next week. The overall quality of the Dist. 3 fruit is very good with good juice content and a nice tight rind and type shape. We expect to have good volume out of dist. 3 through the first of March, and we will start some Dist. 1 fruit in about 3 weeks which is much earlier than normal we should run through May out of Dist. 1.

## GREEN AND RED LEAF LETTUCE

Supplies are average on Green and Red leaf this week. Green and red leaf are both weighing 22-24 lbs. per case and are 9-10" long. Green leaf this week will be very nice

quality with good green coloring. Red leaf quality has improved, and we are no longer seeing any seeder; it is expected to be very nice quality with good coloring as well.

## ICEBERG LETTUCE

Average supplies continue this week. Supplies remain light industry wide. Quality is generally good although we are seeing some insect damage and Sclerotinia in almost all lots. Some lots are still showing a long core. Salinas's lettuce should finish in mid-November. Prices are a bit lower but still relatively high.

## ROMAINE

Supplies are expected to be below average this week. We are expected to be on the lighter side the next few weeks; 10-13 days ahead of schedule. Product is being sorted through so only the best quality gets packed. Quality has improved overall with nice coloring this week. Product is weighting 37-38 lbs. and 12-13" long.

## ROMAINE HEARTS

Supplies are expected to be average this week. Overall quality is good however, we will continue to see some of the issues that result from the past heat. For example: fringe burn, occasional twisting and seeders. The product is clean inside. Please note as a result of harvesting two weeks ahead of schedule during the end of the Salinas season, there will be gaps and shortages in supplies.

## LIMES

Prices are unchanged; stocks are dominated by small sizes. Quality is excellent.

## MANGOS

Supply is getting tight, and prices are high. Brazil has very light supplies, and Ecuador will not start until November.

## NAPA

Salinas's quality is variable. Some internal burn is being reported. Supplies are low this week due to poor yields.

## IDAHO ONIONS

Fob prices are mostly unchanged this week except for an increase on medium red onions. The yellow export market is still very strong out of Washington and that trend is expected to continue through the month of October. This is not having an immediate impact on our Idaho fobs but it's something we must keep an eye on as it will have a major impact on fob prices after January 1st. Some recent reports continue to indicate a small profile in WA and lesser yields compared to last season. Size will be the continuing challenge which will eventually force WA buyers to go to Idaho/Oregon.



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## ORANGES

Demand still far exceeds supply and it is day to day as far as our supplies, but there is light at the end of the tunnel as we will have some new crop navels this Friday and next week we hope to have better supplies. The overall navel crop looks good with ample supplies, fruit is on the larger side which will keep the smaller sizes firm. The overall quality looks good now but will see as we get going and see how the fruit gasses out, the sugar is good and the acid is minimal so the fruit does eat and won't take the enamel off your teeth. California sugar levels range from 12.5 to 13.5 Brix.

## PARSLEY (CURLY, ITALIAN)

This week there are average to light supplies of curly parsley. Italian parsley is plentiful. Overall quality and appearance continues to be very nice on both.

## GREEN BELL PEPPER

**EAST:** Most supplies now coming out of GA with a few still available in NC. Rains to both regions will cause quality and shelf-life issues for the next ten days to two weeks. Our Immokalee crop should begin within the next two weeks. FOB prices are steady to higher.

**WEST:** Western fields have seen rain this week. Volume continues to decrease as quality becomes more suspect. FOB prices are higher.

## JALAPEÑOS

**EAST:** FOB prices are generally steady and quality is generally good.

**WEST:** FOB prices steady with upward pressures. Quality is good.

## RED & YELLOW PEPPERS

Prices are starting to inch up; supplies will diminish through early November, when new fields are harvested.

## PINEAPPLE

Supplies are limited; the Costa Rican market is elevated. Brix levels range from 14 to 15. Stocks are more abundant in Mexico; sugar levels range from 12 to 13 Brix.

## IDAHO POTATOES

Rain at the end of last week halted harvest on Friday and for most the weekend. Most growers resumed harvest on Tuesday but going two days without supply has made cartons tight. We are also seeing a slight market increase on some sizes which is probably due to the rain along with growers holding back some of their supply due to price. Receivers should expect further increases next week on the middle sizes 60's, 70's and 80's as the USDA is already reporting some sales at a \$1.00 above the mostly.

## RASPBERRIES

Prices are level; California supplies are plentiful. Quality is very good: bleeding and bruising are diminishing. Sugar levels range from 13 to 14 Brix.

## SALADS & BLENDS

Prices are steady. Although raw product supplies are increasing, quality issues persist. Respiration rates are accelerated due to brittle texture, core material, internal burn, mildew pressure, and rib blight in some finished packs.

## SNOW AND SUGAR SNAP PEAS

Snow and sugar snap peas are in short supply, with California shippers unable to fill orders in full; this will continue until the harvest for imports from Peru.

## SPINACH (BABY)

Baby Spinach and Clipped Spinach supplies are good. Quality is good with some thicker stems, some occasional weaker texture and inconsistent leaf-sizing.

## SPINACH (BUNCHED)

Steady volume. Quality is good. The market has come off a bit but still staying strong.

## SPRING MIX

The market is stable; stocks are ample. Although quality has improved and shelf-life has increased, slight burn and insect damage are lasting results of recent heat waves. Quality is very good.

## GREEN SQUASH

**EAST:** FOB prices are stronger again this week. Like the yellow, quality has been good but the recent rains will cause quality and shelf-life to suffer.

**WEST:** FOB prices are steady to lower as volume crossing at Nogales is increasing.

## YELLOW SQUASH

**EAST:** FOB prices have been on the floor for the past several weeks but have moved up sharply as a result of the rains that have hit the squash fields. We are already seeing quality and shelf-life issues. GA and northern FL fields are main sources in the east. A few still available in NC and SC.

**WEST:** FOB prices are down this week as Nogales crossings have increased. We expect FOB prices to continue to fall. Quality is variable but improving.

## STRAWBERRIES

The market is climbing due to stronger demand. Last week's rain tightened overall stocks. Quality issues such as bleeding, bruising, mildew, and soft texture persist following the rain and the past month's high temperatures.



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Size is smaller than normal. Sugar levels range from 14 to 15 Brix.

## **TOMATOES**

### **EAST**

#### **Rounds**

Rain has fallen for nearly two weeks in all growing regions in the east. Our grape tomato fields in Beaufort, SC experienced 5 inches of rain in one day. This rain across the region will affect the volume and quality. New fields in Quincy have started but volume remains below average. Local fields continue in the mountains of NC, SC and TN but all fields experienced rain and yields are lighter as those crops are very close to ending and quality is suspect. FOB prices of 5x6s are higher. Delivered prices will also be higher for the 6x6s and 6x7s.

#### **Romas**

Supplies continue to be very tight but romas are one commodity where FOB prices on all sizes are generally steady. Quality continues to be variable.

#### **Grapes**

FOB prices are higher on both bulk and pint flats and we expect supplies to get tighter before new supplies come on line. Quality is becoming more variable.

#### **Cherries**

Supplies continue to be extremely tight as they have been all summer. However, FOB prices are currently steady as demand is weak. Quality is more variable.

#### **Weather Forecast**

**NC/TN MOUNTAINS:** Finally, little chance of rain for the rest of this week. Temperature highs will be in the upper 70s and lows will be in the 50s. Turning cooler this weekend.

**QUINCY:** Sunny tomorrow but clouds for the rest of the week. Little chance of rain. Highs will be in the mid-80s with lows in the 60s.

## **WEST/MEXICO**

#### **Rounds**

Volume and sizing out of CA fields is dropping off dramatically as is the quality out of those fields. Shelf-life is very suspect and it is unlikely that product can be shipped successfully to eastern markets. FOB prices are higher on 5x6s due to decreased supply. Vine ripers continue to cross from Baja and quality remains variable. Vines ripers crossing over at McAllen are light but with better quality. Crossings at Nogales continue this week

but volume has still not completely ramped up. There is upward pressure on all FOB prices both in CA and MX.

#### **Romas**

Supplies continue from CA but are extremely tight. Crossings continue at Otay Mesa and McAllen. Volume out of the newer Mexican fields is down by as much as 50% compared to prior years and those fields have experienced rain this week. There is upward pressure on FOB prices on all sizes.

#### **Grapes**

We are still seeing a range in quality and the range is getting wider. FOB prices of the better quality are higher again this week. Inferior product can continue to be purchased at a discount.

#### **Cherries**

Supplies continue to be tight with a wide range of FOB prices depending on quality. FOB prices for quality product are stronger compared to last week.

## **TREE FRUIT**

The California season is quickly winding down. Late season peach varieties and large-sized red plums are available.

## **WATERMELON**

Prices are up; stocks will remain limited until new crop Arizona/California desert and Mexican fruit is harvested. Quality is excellent: fruit is sweet and juicy. Sugar levels range from 11 to 13 Brix.