

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending November 20, 2015



COMMODITY	PRICE	QUALITY	PRICE TREND
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/Chilean Navels	Poor-Vals Good-Navs	↑
Green & Red Leaf Lettuces	Moderate	Good	↔
Iceberg Lettuce	Extremely High	Fair	↓
Romaine Lettuce	High	Good	↓
Celery	Extremely High	Good	↔
Romaine Hearts	Moderate to High	Good	↑
Cucumbers	Moderate	Good	↔
Green Beans, Green Bell Peppers	Moderate to High	Good	↔
Red Bell Peppers	High to Extreme	Fair to Good	↔
Yellow Squash, Zucchini	Moderate	Excellent	↑
Green & Red Seedless Grapes, Cantaloupes, Honeydews	Moderate	Good	↔
Plums	DONE	DONE	DONE
Carrots, Frisee, Spring Mix, Mache, Arugula	Moderate	Good	↔
Bok Choy, Napa	High	Fair	↑
Artichokes	Moderate to High	Excellent	↔
Asparagus, Cauliflower	Moderate to High	Good	↑
Broccoli	Moderate to High	Good	↔
Parsley (Curly & Italian)	Moderate to High	Very Good	↑
Fennel/Anise	High	Very Good	↔
Peeled Garlic	Extreme	Good	↔
Green Cabbage	High	Excellent	↔
Green Onions	High	Fair	↑
Kale (Green)	Low	Very Good	↔
Red Cabbage	High	Excellent	↔
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	↑
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	↔



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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 Niño, we can likely expect to see abnormal weather extremes through early 2016. We also have our eyes on a storm in the tropics. We are seeing quality issues as well as shortages with green onions, napa, lettuce, leafy veg and berries.

WASHINGTON APPLES AND PEARS

Demand is very good as well as movement. There are still good buying opportunities for old crop 100 larger reds, demand stronger on 113 smaller, quality remains good. Export demand is very high and causing shortages on smaller sizes, all varieties. New crop Galas, Granny Smiths, Golden Delicious, Fuji's, and Honey crisp are now in good supply as well as Bartlett's, D'Anjous, & Bosc pears. Sugar levels are high, measuring 15 to 18 Brix (sugar to acid ratio).

ARTICHOKES

Volume is 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

Market is good. Still limited on larger sizes. Quality good.

AVOCADOS

Best buys for this week are 32s/36s/40s #1.

BANANAS

Supplies are much better, and quality is good.

BLUEBERRIES

Continued tight availability; the harvest in the Pacific

Northwest has finished. Argentina is now the primary growing area, with Mexico beginning to come into production. We should see an improvement within a week or two.

BLACKBERRIES

Extremely tight supplies due to rain in Mexico. Mexico will start increasing the supply and we are hoping to see more supplies within the next two weeks. Sugar levels range from 12 to 13 Brix.

RASPBERRIES

Moderate availability in Central and Southern California. Oxnard and Central Mexico will be top producing regions. The rain has had a slight effect on raspberries but overall we are in a much better situation with them than straws. Quality is average: sugar levels range from 13 to 14 Brix.

STRAWBERRIES

Demand exceeds supplies. We are seeing many quality issues including bruising, mildew and product being overripe. Forecasted volumes continue to decrease as growers struggle with harvest due to the effects of the rains that fell across our California growing regions. The northern region has ended due to rain. We are seeing extreme shortages in product as well as quality issues. We are hoping to see Florida come on in December which will help. We will keep you updated with the most current information regarding this situation.



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BOK CHOY

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

BROCCOLI

Moderate supplies are expected for the next couple of weeks.

CANTALOUPE

Market fairly strong and steady as some of the California desert growers are finishing up, but there is descent supplies out of the Arizona desert. The fruit is peaking on 6's and 9's keeping 12's and smaller extremely tight and prices much stronger on the smaller fruit. The overall quality of the fruit is good with some fruit showing some mud or dirt due to the weather they have had in those regions, but the fruit cuts excellent with great sugar and internal color. We expect to go through the 3rd week and possibly longer, offshore will start to arrive in Florida towards the middle of next week, and volume will start to arrive around the 25th of November in Florida.

CARROTS

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

CAULIFLOWER

Most shippers are experiencing a shortage in supply as product pulled forward last week. We see a significant supply in gao that will extend well into late November. We are seeing high prices and short supplies industry wide.

CELERY

Please be aware that the celery market continues to escalate, and quality is an issue. We hope to see some relief in the next week or two.

CILANTRO

The Cilantro market has continued to drop. Quality is good. Demand has gone down reducing FOB prices. Currently, all cilantro is out of the U.S.

CORN

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

CUCUMBERS

EAST: Stronger demand with good steady supplies. Prices remain low but we are seeing upward pressure.

Quality remains good.

WEST: Good volume is crossing at Nogales. FOB prices are generally steady. Quality is good.

ENGLISH CUCUMBER

Good availability in Nogales.

EGGPLANT

EAST: FOB prices are steady to higher. Quality is good.

WEST: FOB prices are steady but better supplies by the weekend may put downward pressure on those prices. Quality is general good.

FENNEL

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

GARLIC

Market remains extremely tight. 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

Market very strong and steady as we are winding down our picking earlier than normal due to the rains that have caused some damage, there is still some fruit that was covered that made it through better than others but still moisture will take a toll on the fruit as the water sits in the cap stem and then fruit will decay very rapidly. The green grape market is very strong and prices continue to climb and will do so until we finish our season which we hopefully will make it through middle of December. The red grape deal is also climbing upwards and will continue to do so each week as we go forward. The overall eating quality is excellent with great sugar and good color for the most part. Green seedless sugar levels average 18 Brix; red seedless levels range from 21 to 22 Brix.



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GREEN BEANS

Plentiful availability in Georgia, moderate production volume in Coachella. The harvest transition in the West will be tenuous, with Coachella finishing sometime the week of November 16th and Mainland Mexico beginning the week of November 23rd.

GREEN CABBAGE

Green cabbage supplies remain below expected volume, due to smaller sizing and lighter weight heads in fields. Quality is an issue, prices are high.

RED CABBAGE

Quality and sizing have been great, with great color and very little discoloration. Overall market is strong.

GREEN ONIONS

Iced: The market remains very tight due to light supplies and or no supplies in the Salinas Valley. Please expect short supplies and high prices.

HONEYDEW

Market is steady with good supplies out of the California desert and also Mexico. There is better supplies on the larger fruit but general ample supplies across the board. The overall quality of the Arizona and Mexico fruit is very good with nice green to cream exterior and great sugar content with excellent internal meat. We expect to see ample supplies going forward and do not expect any gaps between offshore and these 2 growing regions. Sugar levels range from 10 to 11 Brix.

KALE (GREEN)

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

KIWI

Chilean kiwi is still available; condition is holding well, with great taste. New crop kiwi from California is in good supply.

LEMONS

Market very strong across the board as supplies are good but demand is also excellent, the 165's and smaller are very tight as we are peaking on 95's and 115's out of dist. 1 and dist. 3, which is creating this tight situation. We will see some smaller fruit once we start dist. 2 around February and also middle to end of December we should see some better supplies of dist. 1 fruit once we go back into the blocks we have already sized picked. The overall

quality of the fruit is very good with more gas hours on the fruit out of dist. 1 versus dist. 3 which you will see some spotting and green tinge on the dist 1. Fruit. The overall juice content and fruit strength is very good out of both districts. There is still some Mexican fruit crossing but we should see the Mexican deal finished in the next 10 days or 2 weeks.

GREEN AND RED LEAF

Supplies are below 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 and red leaf are seeing fringe burn and wind burn.

ICEBERG LETTUCE

Supplies for the next two weeks will be extremely tight. Yuma has had a very slow start. Markets are high and quality is poor, including issues with mildew, weak tip and insects. Please be aware that we will see challenges with the size and weight for the first couple of lots in Yuma.

ROMAINE

Supplies are expected to be below average this week. We are expected to be on the lighter side the next two weeks. We are seeing shortages in product and price increases.

ROMAINE HEARTS

Supplies are expected to be very below average. 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. Expect high prices and shortage in supply.

LIMES (PERSIAN)

Pricing is steady. Supplies are in line with movement.

MANGOS

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

NAPA

Supply issues out of Salinas will continue to be extremely low, demand exceeds supply in some circumstances due to lower than expected harvest yields. We are seeing quality issues of internal rot and discoloration due to weather related issues.



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ONIONS

Because growers are shipping exclusively out of storage, supplies are meeting demand. Red onion pricing remains firm, while yellow and white onion pricing has softened some.

ORANGES

Market is very strong on 72's and larger and the 88's and smaller are in very good supply the overall quality on the oranges is good with very good sugar and low acid so the fruit does eat for this early in the season. We are still gassing about 5 days prior to pack to bring on color so you will see some spotting and also will see a light green tinge on some fruit, we are experiencing some colder nights which is helping to bring on color naturally so our gassing hours will start to come down over the next 2-3 weeks. The recent rains have kept us out of the fields for a few days as we need the fruit to be completely dry before picking or we will run into heavy spotting and skin breakdown after gassing. We anticipate good supplies going forward barring any major weather systems.

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: Demand is stronger this week as we near the holidays. The GA crop is finishing up and we are seeing quality issues in the form of wall and stem decay. The Immokalee crop is looking much better. FOB prices are slightly higher compared to last week with continued upward pressure due to the increased demand.

WEST: FOB prices are steady to higher this week compared to last week on all grades and sizes. Cool weather is causing a dip in yields and continued upward pressure on prices will probably continue through the weekend.

JALAPEÑO PEPPER

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

WEST: Supplies have become much tighter and FOB prices are higher this week.

RED & YELLOW BELL PEPPERS

Extreme market conditions continue for red bell peppers. The Coachella Valley harvest has started, along with a few hothouse colored bells from Mexico. The size profile

will be skewed toward small sizes, the result of abnormal weather that occurred during August and September... rain and heat. Weather effects will also be felt in the Mexican crop (Baja & Mainland Mexico) through the mid-January 2016 as tropical storm activity has caused a bloom drop, which will result in below-normal production for the intermediate term.

PINEAPPLE

Prices are stable; volume has increased to normal levels. Quality is good: fruit is firm yet juicy. Sugar levels are approximately 16 Brix in Costa Rica and range from 13 to 14 Brix in Mexico.

POTATOES (IDAHO)

The carton supply has gotten more plentiful on all sizes. Demand is peaking on 'middle' sized cartons between 60ct and 80ct. Shippers are running extended shifts to generate enough small potatoes to fill consumer bags for retail Thanksgiving ads. Because of this, there should be plenty of cartons ran up as a byproduct to these ads for the next several weeks. All reports are indicating higher prices this season than it has been last season due to a decrease in supply.

SALADS & BLENDS

The market is up. Harvesting and production are moving from Salinas to Yuma for the fall/ winter months. Expect rain-related problems such as premature pinking and shortened shelf life until the transition is complete.

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 transition to Mexico occurs in November. Prices continue to advance, including prices 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

Spring Mix quality is good with some oversizing in certain components. Demand and supplies are good.



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GREEN SQUASH

EAST: FOB prices continue to be weak but are off the floor prices of last week by a couple of dollars. Quality continues to be good.

WEST: Good volume continues to cross at Nogales. Like the east, FOB prices continue to be weak but are off of the floor by a couple of dollars. Quality is good.

YELLOW SQUASH

EAST: FOB prices continue to be weak but are off the floor prices of last week by a couple of dollars. Quality continues to be good.

WEST: Good volume continues to cross at Nogales. Like the east, FOB prices continue to be weak but are off of the floor by a couple of dollars. Quality is good.

TOMATOES

EAST

Rounds

The Palmetto/Ruskin fields are in full production. FOB prices have fallen by several dollars again this week on all sizes. However, this may be the low-water mark for FOB prices for the remainder of the year. We do not forecast any dramatic increases in prices through December but we do see upward pressure on prices for the remainder of 2015. Warmer than normal temperatures over the past several weeks has caused the Florida crop to come to maturity a little quicker than normal and anticipated. This has caused a flush of supplies here at the beginning of the season but may result in less volume from these fields as we finish up the year. Also, and maybe more importantly, as we have reported in past weeks, the Mexican yields are below average due to earlier weather conditions. The West will have to go East to meet demand. For how long and how much the West will have to go East will have large factor on Eastern FOB prices. And finally, we are seeing increased demand nationwide for tomatoes since prices have been fallen. How this demand responds to any future price fluctuation will also have a bearing on the direction and strength of any price changes. Quality continues to be good.

Romas

Romas is the one tomato commodity to see higher FOB prices this week compared to last week. Even though supplies continue to be tight in the East, the main reason for higher roma prices nationwide is the shortage of roma yields out of Mexican fields. These low Mexican yields have been reported for several weeks. Because of tight

supplies on both coasts, we look for romas to continue to run higher compared to the other tomato categories for the remainder of the year. Quality in the east is good.

Grapes

FOB prices have fallen substantially again this week on both bulk and pints. Quality is good.

Cherries

FOB prices are down substantially again from last week. Quality is improving and is now generally good.

WEST/MEXICO

Rounds

CA growers have finished for the season. The West is going to Florida to meet their demand for mature greens. Nogales crossings should start next Tuesday. Vine-ripes continue to cross at Otay Mesa, McAllen and Nogales. Cooler than normal weather has caused yields to suffer and volume at all crossings points is generally light.

Romas

The cool weather has cut severely into Baja crossings and orders are now being pro-rated. Supplies are also tight at Nogales and McAllen. We have previously reported on the abnormally low yields from these Mexican roma fields and we expect the lack of supplies will put upward pressure on romas for the remainder of the year. The level of demand will be a large factor on future FOB prices. Quality is variable.

Grapes

We are still seeing a very wide range in quality and corresponding FOB prices. Grapes are crossing at Baja and Nogales but most repackers are sourcing out of Florida due to pricing and quality issues.

Cherries

Limited supplies continue and there continues to be a wide range of prices due to a wide range of quality. But like the grape tomatoes, most repackers are sourcing out of Florida due to pricing and quality issues.

WATERMELONS

Watermelon prices are very strong as the majority of supplies are now coming from Mexico. 45 count seedless and big melons are in tight supply. Carton 5's and 6's are available. Quality seems to be nice. East coast is going to have high prices due to extra freight from Nogales and McAllen. Sugar levels range from 11 to 13 Brix.