

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending December 4, 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	↓
Oranges, Navels	Some CA/Chilean Navels	Poor-Vals Good-Navs	↑
Pineapples	Moderate	Good	↔
Green Leaf, Red Leaf, & Romaine Lettuces	High	Good	↔
Iceberg Lettuce	High	Fair	↔
Romaine Hearts	High	Good	↑
Cucumbers	High	Good	↔
Green Bell Peppers	Moderate to High	Good	↔
Green Beans	High to Extreme	Good	↑
Red Bell Peppers	High to Extreme	Fair to Good	↔
Yellow Squash, Zucchini	Moderate	Excellent	↔
Green & Red Seedless Grapes, Cantaloupes, Honeydews	Moderate	Good	↔
Carrots, Frisee, Spring Mix, Mache, Arugula	Moderate	Good	↔
Bok Choy, Napa	High	Fair	↑
Artichokes	Moderate to High	Excellent	↔
Asparagus, Cauliflower	Moderate to High	Good	↑
Celery	Moderate	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

We have a very slow start in Yuma. Expect to see high prices and very limited product. We are seeing quality issues (very light weight) as well as shortages with green onions, Napa, lettuce, leafy veg and berries. Over the last two weeks we also saw an EXTREME MARKET on strawberries, celery, cauliflower and broccoli. Cauliflower and strawberries are almost non-existent. Broccoli crowns are non-existent and we are subbing Broccoli 14/18 to account for this supply interruption. These next months will be challenging as well, with the prediction of the developing El Nino, we can likely expect to see abnormal weather extremes through early 2016.

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. Sugar levels are high, measuring 15 to 18 Brix (sugar to acid ratio). 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.

ARTICHOKES

Volume is steady. 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 is good.

AVOCADOS

The market is level. Stocks are plentiful, especially 48-count and smaller sizes. Quality is very good: high oil content is creating buttery texture and slightly nutty flavor.

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 this next week.

RASPBERRIES

Moderate availability in Central and Southern California. Oxnard and Central Mexico will be top producing regions. The rain has had a slight affect on raspberries but overall we are in a much better situation with them than straws.

STRAWBERRIES

Demand exceeds supplies. We are seeing many quality issues including bruising, mildew and product being over-ripe. 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.

BOK CHOY

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



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BROCCOLI

DEMAND EXCEEDS SUPPLY. We expect to stay in this situation for another week or so. Poor weather over the past several weeks has slowed the growth and maturity of broccoli. Stocks will be very limited for the next two weeks. Quality issues include hollow core and knucky branches.

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. Sugar levels average 10 to 12 Brix.

CARROTS

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

CAULIFLOWER

EXTREME MARKET: DEMAND EXCEEDS SUPPLY. 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 after the holiday.

CILANTRO

The Cilantro market is steady. 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: Strong demand causing higher FOB prices again this week.

WEST: Product continues to cross at Nogales. FOB prices are generally steady. Quality is good.

ENGLISH CUCUMBER

Steady supplies in Nogales.

EGGPLANT

EAST: FOB prices are steady to lower.

WEST: FOB prices are lower. Quality is generally 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.

GREEN BEANS

Pre-holiday availability has tightened in the East and West going into Thanksgiving; demand exceeds supply. Yields have declined in Florida due to weather issues, while the harvest transition is underway from Coachella to Mainland Mexico. We have the potential to continue with tight market conditions through the intermediate term.



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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 LETTUCE

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. We are seeing improvement in quality.

ICEBERG LETTUCE

Supplies for the next two weeks will be extremely tight. Yuma has had a very slow start. 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 few 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)

Prices are climbing. Supplies are limited; demand is strong. Quality remains very good: fruit is juicy and tart.

MANGOS

Supply is still very active and prices are moderate. Brazil has very light supplies, and Ecuador is starting. We should see this improve in the next few weeks.

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.

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. Trucks have tightened significantly due to holidays and rates have increased rapidly. Growers remain bullish on the long-term outlook on the market. Once demand does pick-up, we expect pricing to increase.



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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. Sugar levels range from 11 to 13 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: Our Immokalee fields are in full production. FOB prices are generally lower this week on all sizes and grades.

WEST: FOB prices are lower this week compared to last week on all grades and sizes.

JALAPEÑO PEPPER

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

RED & YELLOW PEPPER

The market will remain elevated until late December when Mexican production increases.

PINEAPPLE

The market is steady; supplies are sufficient. 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

PFG suppliers of Peak salads and blends have successfully moved their processing plant from Salinas to Yuma this past weekend. Raw product supplies are limited, resulting in high prices this time of year.

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. Demand and supplies are good.

GREEN SQUASH

EAST: Demand is weak. FOB prices are steady to lower this week.

WEST: Crossings continue at Nogales. FOB prices slightly higher this week.

YELLOW SQUASH

EAST: FOB prices are steady to lower this week on both medium and fancy grades.

WEST: Crossings continue at Nogales. FOB prices steady to higher this week.



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TOMATOES

EAST

Rounds

The Palmetto/Ruskin fields continue in full production. Immokalee fields have also started producing. The west continues to be forced to come to the east to meet demand. However, demand continues to be generally weak. FOB prices are steady with downward pressure on 6x6s and 6x7s. Quality continues to be good.

Romas

Demand is moderate as the west continues to come east to meet demand. Supplies are better which has caused FOB prices to fall a couple of dollars on all sizes. Quality in the east is good.

Grapes

FOB prices are generally steady on the 12/1 flats and are down on the bulk. Quality is good.

Cherries

Demand is weak. FOB prices are lower this week. Quality is good.

WEST/MEXICO

Rounds

The West continues to look to Florida to meet their demand for mature greens. Vine-ripes continue to cross at Otay Mesa, McAllen and Nogales. Crossings continue to be abnormally light.

Romas

Slightly more supplies are available but volume is still so light that no USDA quote is given and most suppliers are going east to meet demand.

Grapes

We are still seeing a very wide range in quality. Grapes are crossing at Baja and Nogales with light volume and 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

Although Mexican stocks are becoming more plentiful, prices remain elevated. The Florida and offshore seasons will begin in December. Quality is very good: fruit is sweet and juicy. Sugar levels range from 11 to 13 Brix.