

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending December 11, 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 & Red Leaf Lettuce	Moderate	Good	↔
Romaine & Iceberg Lettuce	Moderate	Fair	↔
Romaine Hearts	Moderate to High	Fair	↑
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	↔



FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending December 4, 2015



MARKET OVERVIEW

We have a very slow start in Yuma due to the cold night that has significantly slowed the growth cycle. Expect to see high prices and very limited product. We are seeing quality issues (very light weight) as well as shortages with Napa, lettuce, leafy veg and berries. Over the last two weeks we also saw an EXTREME MARKET on strawberries, celery, and broccoli. Cauliflower is currently in an Act of God. Broccoli crowns are non-existent and many suppliers 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 Niño, we can likely expect to see abnormal weather extremes through early 2016. We will keep you as up to date as we can.

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 elevated, 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 tight. Quality is good with minimal yellowing and thick stems.

ASPARAGUS

Expect the market to spike over the next week. Mexican growers are transitioning from Baja to the mainland areas. The Peruvian season will wind down over the next two weeks.

AVOCADOS

The market is low. Volume is high, particularly 60-count and smaller fruit; 36-count and larger sizes are limited. 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; although improving 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

Moderate supplies. Mexico will start increasing the supply and we are hoping to see more supplies as we go. 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, although we are seeing improvement. 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 will keep you updated with the most current information regarding this situation.



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BOK CHOY

Availability is good.

BROCCOLI

DEMAND EXCEEDS SUPPLY. We expect to stay in this situation for another week, the cold nights in Yuma are resulting in a slower growth rate.

CANTALOUPE

Market is very strong with limited availability on the west coast and better availability on the east coast on Guatemalan fruit, but melons are all very large peaking on 9's and 6's with demand far exceeding supply on 12's and smaller. The overall quality of the fruit has been good with nice internal color and some green to straw external color with a fairly even net. We expect to see better supplies in the next few weeks but sizes will continue to be on the larger side. Sugar levels average 10 to 12 Brix.

CARROTS

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

CAULIFLOWER

ACT OF GOD: DEMAND EXCEEDS SUPPLY. We are seeing high prices and NONEXISTENT supply. We expect another 10 days of this.

CELERY

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

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.

CUCUMBERS

EAST: FOB prices are lower this week on all grades. Quality is more variable.

WEST: Product continues to cross at Nogales. FOB prices are generally steady with downward pressure.

ENGLISH CUCUMBER

Good availability in Nogales.

EGGPLANT

EAST: FOB prices are lower on all grades and sizes.

WEST: FOB prices are generally steady.

FENNEL

Supplies for the week will be average. 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 strong to steady as we are basically done harvesting and packing some fruit out of totes that we have had in cold storage and cleaning up any problems that manifested themselves from rain damage and packing into cartons. There is a range of fruit quality due to the rains and cold night effecting the overall quality. We will have domestic fruit through December as long as the quality of the fruit holds up. The Peruvian fruit has started to arrive on both coasts and we will start to see some Chilean arriving the end of next week, the prices are very high and strong as the volume is minimal at this point. We will see some better volumes around the end of December and then by the middle part of January we will see good volume of Chilean fruit and the market should start to ease. Green seedless sugar levels average 18 Brix; red seedless levels range from 19 to 20 Brix.

GREEN BEANS

Tight supplies and high prices continue in Florida, while availability has improved in Nogales.

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.



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GREEN ONIONS

Iced: The market is steady, quality is good.

HONEYDEW

Market is steady with most of the volume coming out of Mexico and overall quality is very good with excellent sugars and nice internal color and a clean green to cream external color. The sugars are very good and we should have excellent supplies going forward. The Mexico deal should go through February and then it will be offshore fruit picking up the volume. 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

California has good supply.

LEMONS

Market steady and very strong on 140's and smaller with the larger fruit is in abundance with deals being made to move volume. The overall quality of the fruit is good out of both dist. 1 & 3 with gas hours also coming down due to the colder nights bringing on color and helping to strengthen the fruit, we anticipate good supplies going forward out of both districts through March and then we will probably see things get a little tighter.

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.

ICEBERG LETTUCE

Supplies for the next two weeks will be extremely tight. Yuma has had a very slow start due to the cold nights. Please be aware that we will see challenges with the size and weight for the first couple of lots in Yuma as well as blistering from the cold weather.

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.

LIMES (PERSIAN)

Prices are rising. Strong demand and cold weather are depleting volume. Quality is 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

All suppliers have started harvesting in Yuma, some internal problems are being reported. Supplies are low and prices are high.

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 steady with good supplies of 72's and smaller and tighter supplies of 56's and larger. The overall fruit quality continues to get better every day as we are experiencing some colder nights which is helping to bring on the color where we are down to 24 hours to 0 gas hours, and also really helps to firm up the fruit. The eating quality is excellent with brix levels around 12-12.5, and juice content continues to increase as well. We anticipate overall quality to stay excellent barring any major weather issues, and should have ample supplies of all sizes going forward as there is a good mix of size out there. Sugar levels range from 11 to 13 Brix.

PARSLEY (CURLY, ITALIAN)

This week averages are below normal of curly parsley. Prices are high. Overall quality and appearance continues to be very nice on both.

GREEN BELL PEPPER

EAST: Our Immokalee fields continue in full production. The rains have caused the quality of all dry vegetables to become more variable. Accordingly, inventory levels should be kept tight. 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 generally steady.



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RED PEPPER

Demand exceeds supply on red bell peppers. The harvest in Coachella is winding down, while Baja California yields are minimal. The Nogales season (from Mainland Mexico) has not yet started, with the exception of a few hothouse-grown red bells.

PINEAPPLE

The market has stabilized; 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. Cold temperatures this week in Idaho have forced a few growers to stop running, but supplies are still exceeding demands allowing pricing to remain consistent. 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 high, but raw product supplies are starting to increase in Yuma.

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

The market is level. Although quality has been very good in the Yuma region, this week's freezing temperatures could cause problems.

GREEN SQUASH

EAST: FOB prices are generally steady with downward pressure this week. Quality is more variable.

WEST: Crossings continue at Nogales. FOB prices moderately lower this week.

YELLOW SQUASH

EAST: FOB prices are lower this week on both medium and fancy grades. Quality is more variable.

WEST: Crossings continue at Nogales. FOB prices lower this week.

TOMATOES

EAST

Rounds

Florida fields are in full production but yields and quality are down from last week due to several days of rain. Demand is very good as the west continues to be forced to come to the east to meet demand. Also, we are seeing the typical post-holiday demand increase. FOB prices are \$1-\$4 higher depending on size with the larger sizes seeing the larger increases.

Romas

Demand is stronger this week for the same reasons as for the rounds. Due to the rains, the quality has become more variable. FOB prices are generally steady with some downward pressure.

Grapes

FOB prices on the 12/1 flats and the bulk pack are up slightly compared to last week due to increased demand. Quality is fair to good.

Cherries

Demand and supplies continue to be weak. A range of FOB prices are being reported due to a range in quality. FOB prices for quality fruit are higher this week.

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. Volume at crossing points continues to be too light to produce a USDA quote.

Romas

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



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Grapes

We are still seeing a very wide range in quality. Grapes are crossing at Baja and Nogales with light volume and most re-packers 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 re-packers are sourcing out of Florida due to pricing and quality issues.

WATERMELONS

Prices are up. Mexico is the main source, although the Florida and offshore seasons will start in mid-December. Seeded fruit is extremely limited. Quality is very good: fruit is sweet and juicy. Sugar levels range from 11 to 13 Brix.
