

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending March 18, 2016



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



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MARKET OVERVIEW

The weather has very been warm. We are seeing quality issues with product resulting from the heat. Lettuce is a good buy. The berry market is good. Celery has improved with most growers. Green beans and green peppers are still low in supply and very high in price.

WASHINGTON APPLES AND PEARS

The Washington storage market is weak; small sizes are most plentiful. Varietals like Braeburn, Honeycrisp, and Pink Lady are on the market. Sugar levels average 11 to 12 Brix (sugar to acid ratio). Quality is excellent: texture is crisp and flavor is sweet and tangy. Washington prices are low; storage volume is high. Quality is excellent: flavor is subtly sweet with hints of lemon/lime. Sugar levels average 12 Brix.

ARTICHOKES

Volume is steady. Most of the volume this week is expected to be 12's, 18's and 24s. Quality is excellent and most sizes are higher in price.

ARUGULA

Supplies of both baby and wild arugula are good. Quality is showing signs from the water.

ASPARAGUS

We are seeing good supply on smaller sizes and good quality. Expect to see prices and demand go up for the upcoming holiday. Quality is good.

AVOCADOS

Prices are lowest in Mexico, where stocks are abundant. New crop California volume is increasing; the season will run through October. Quality is very good: texture is buttery and flavor is nutty.

BANANAS

Supplies are much better. Quality is good.

BLUEBERRIES

Prices are near the bottom. Chilean supplies are ample; Mexican stocks are becoming more plentiful. Expect a steady market for another week or two, when Chilean volume will begin declining. The California season should start in mid-April. Overall quality is very good: fruit is sweet, yet tangy.

BLACKBERRIES

The market is low; ideal weather is increasing volume. Quality is very good: sugar levels range from 12 to 13 Brix.

RASPBERRIES

Prices are starting to inch down. Supplies are increasing. Quality is very good: fruit is plump, juicy, and sweet. Sugar levels range from 13 to 14 Brix.

STRAWBERRIES

West Coast prices are rising. California supplies are limited due to wet weather. More rain is in the forecast for later this week and next week. Expect problems such as bleeding, bruising, decay, water damage, and wind scarring to reduce volume. Florida weather has been much drier. Stocks are plentiful; prices are steady.

BOK CHOY

Availability is good.

BROCCOLI

Supplies are running a little less than average. We do expect to see the desert finish early resulting in a possible gap within the next few weeks.

BRUSSELS SPROUTS

We are seeing improvement in this market, however supplies are light. Prices are moderate.

CANTALOUPE

Market is steady with good volumes of 9's and 12's on both coasts and lighter supplies of the smaller sizes. The overall quality has been good with some lots showing some weakness with sunken areas and a more green cast, but for the most part some very nice fruit that is eating good and has good internal color. We expect to see good volumes moving forward and depending on our weather here on the west we should not see a transition gap. Quality is very good: sugar levels range from 11 to 12 Brix.



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CARROTS

EXTREME MARKET ON JUMBOS AND STICKS. Availability is below average for jumbo carrots in the Cuyama Valley of California. We are seeing very low yields due to the amount of mud the rain brought to these crops, we are not getting the size up to spec. Prices are high and we are seeing extreme shortages.

CAULIFLOWER

Market is good, plentiful supplies. We expect to see this tighten up as we transition back to Salinas.

CELERY

Although the price has come down, it still remains moderate for celery. Duda is a huge supplier of celery in CA. They are reporting that they still have not recovered from the celery shortage over the last six months. They require very specific lengths and weights on their celery and they are still not seeing this. They expect to be back to normal within a few weeks, improving as every week passes.

CORN

Late-season corn (yellow, white) from California is in limited supply.

CUCUMBERS

EAST: The off-shore Honduras product continues to unload but we are in the last week or two of that crop. The quality of the off-shore product continues to fall and shelf-life is also suspect. We expect that the cucumber market in March will be strong as the off-shore crop comes to its end and the central Florida domestic crop is late with expected lighter yields as the result of wet, cloudy and cool weather. The Florida crop should begin to be harvested within a week to ten days.

WEST: Product continues to cross at Nogales. FOB prices are higher compared to last week as demand is stronger due to the east coming to MX to meet demand. We expect the Baja crop to begin harvesting by the end of March.

ENGLISH CUCUMBER

Good availability in Nogales, however prices have rebounded from depressed levels.

EGGPLANT

EAST: FOB prices are generally steady. Quality of eggplant remains generally good.

FENNEL

Supplies for the week will be good. Sizing throughout the week looks to be predominately 18's and 24's with very nice quality.

GARLIC

Market will remain very steady. We will be using Argentine garlic until the crops in CA mature. We will be watching the CA crop weekly.

GINGER

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

GRAPES

The overall quality of Flames and sugarones is fair to good with some weaker fruit out there showing some splits and sunken cap stem areas and sugar contents not as high as we would like to see, but we are getting to the end of flames and for the most part we will be done with flames by first of next week. The crimsons have started to arrive and the fruit does look much better as far as fruit strength and descent sugar content, but very light supplies of Crimsons at this point. The red market has started getting stronger as Flames fizzle out and crimson volumes continue on the lighter side. The greens will also start to strengthen on good quality fruit and we will probably see a split market.

GREEN BEANS

Although prices have eased slightly, we will not see any significant relief from current extreme price levels until mid-March, when new spring crop beans will become available in Nogales. Strong demand for Easter is expected to lend support to the market. Production in Florida remains light and prices remain at the extreme.

GREEN CABBAGE

Green cabbage supplies remain below expected volume due to the winter season ending. We are seeing some quality issues such as seeders.

RED CABBAGE

Quality and sizing has been great, with good color. Overall, the market is strong.

GREEN ONIONS

Demand has increased and quality is good.

HONEYDEW

Market has eased a bit as the volumes have increased on both coasts especially on 5's and 6's which are the peak sizes right now. The overall quality of the fruit is good to very good with a nice green to cream cast and nice green internal color and sugars. We expect the market to keep fairly steady now going forward and start to strengthen up around the end of March. Again we do not expect and transition gaps once we start domestically around the first of May. Quality is excellent: fruit is juicy. Sugar levels range from 10 to 11 Brix.



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KALE (GREEN)

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

KIWI

Good supply from CA. Quality is good.

LEMONS

Market is steady and strengthening on the 165's and larger, again we have been out of the fields due to the rains so supplies are starting tighten up. We are hoping to get back in to pick Weds or Thursday and hopefully get lots of fruit picked as they are predicting rain Friday through Monday. The overall quality of the fruit is fairly good with some blocks showing some signs of weakness, clear rot and skin breakdown, the internal condition of the fruit is good with excellent juice content.

LETTUCE: GREEN AND RED LEAF

Supplies are plentiful and quality is good.

ICEBERG LETTUCE

Demand is low, plentiful supplies. We are seeing mildew and bottom rot. These issues could affect the market.

ROMAINE

Supplies are good and quality is average. Rain has affected the harvest and we are seeing some epidermal blister and peel, though it has improved quite a bit.

ROMAINE HEARTS

Supplies are good and quality is good.

LIMES (PERSIAN)

Expect prices to climb over the next five to six weeks; the market should stabilize by mid- to late April. Large sizes are tight. Quality is average: scarring is a minor issue that should not be a problem in new crop supplies.

MANGOS

Supply is still very active and prices are moderate. There is fair supply of red mangos.

NAPA

Market is still very active. We have started harvesting in Yuma and have received reports of some internal problems.

ONIONS

We are now officially done with Colorado onions as of today. Our Idaho/Oregon sheds are still looking at the end of March or the first week of April as the dates they will wrap things up for the season. Good supply of Mexican onions seem to be available coming in through McAllen, TX with all varieties available. The old crop deal will continue to be a buyers' market until supply is gone.

ORANGES

Market has strengthened as we have had anywhere from 1-2 inches of rain since Saturday which has kept us out of the field and we will probably not get in until possibly weds. But most likely Thursday and all sizes are getting a bit tighter due to the lack of supply. They are also calling for rain starting Friday thru Monday so things will be a bit tight and we will keep you posted as we go forward. The overall quality of the fruit is good with some fruit showing some puff and crease and separation, but sugar and juice content is excellent. We will be in navels through May and probably start some Valencia's around mid-April. Sugar levels range from 11.5 to 13 Brix.

PARSLEY (CURLY, ITALIAN)

This week's averages are normal for curly parsley. Prices are normal; overall quality and appearance continues to be very nice.

GREEN BELL PEPPER

EAST: Supplies continue to be weak but demand is even weaker. FOB prices have fallen on all grades and sizes. Quality has been generally good.

WEST: Demand is anemic causing downward pressure on FOB prices. As long as demand remains this week, there will not be much pressure for prices to rise. However, the market will get stronger quickly if there is any up-tick in demand. Quality is variable.

JALAPEÑO PEPPER

EAST: More supplies are putting downward pressures on FOB prices. Quality is improving.

RED & YELLOW PEPPER

Prices continue to ease week by week; stocks are increasing. Quality is very good: skins are smooth and flavor is peppery, yet sweet.

PINEAPPLE

The market is stable, although supplies are tight and demand is strong. Stocks will increase by late March. Quality is very good: sugar levels range from 13 to 16 Brix.

IDAHO POTATOES

We have seen excess supplies throughout the state disappear over the last 7 days. The market spread is beginning to close as the bottom of the mostly is moving up. Most the sheds have achieved this by taking run days off. Current FOB pricing continues to strain Idaho growers and many can't afford to let supply go at current market levels. With growers experiencing higher shrink than normal, those who can hold on to supply will wait for better pricing. This will help move FOB prices upward.



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RADISHES

Market is steady in CA. Great quality.

SALAD BLENDS

Prices are level. This month's high temperatures have caused heat-related defects in iceberg and romaine, including chunks/wads, core pieces, and occasional mildew damage.

SNOW AND SUGAR SNAP PEAS

Snow and sugar snap peas are still in high demand, quality is good.

SPINACH (BUNCHEDED)

Supply is steady, demand is strong. Quality is showing some stress from warm weather.

SPINACH (BABY)

Baby Spinach and Clipped Spinach supplies are good. Quality and volume are showing stress from the heat. The market is normal.

SPRING MIX

Prices are steady. Stocks are ample, but mildew is a slight issue in some lots.

GREEN SQUASH

EAST: FOB prices are higher on all grades and sizes. Quality and shelf-life is variable.

WEST: Crossings continue at Nogales. FOB prices are higher. Quality remains generally good.

YELLOW SQUASH

EAST: After one week of FOB prices falling, prices are higher again this week on both grades. Quality and shelf life remain variable and generally fair at best.

WEST: FOB prices are stronger this week. Quality is variable due to the heat the crops have gone through last month. Crossings continue at Nogales.

TOMATOES

EAST

Rounds

The El Niño weather pattern appears to have finally broken for the spring. Our southern Florida fields have seen little rain for the past two weeks and the chance for rain in the next week is slim. However, the effects of all the rain, wind and clouds over the winter will continue to affect yields for several weeks to come. The size of eastern tomatoes continues to get smaller. This is causing the price of the smaller tomatoes to continue to fall. The supply of Ex-Large tomatoes is tighter which is putting upward pressure on their FOB cost. Quality continues

to be generally good. A few growers in the Ruskin area are just beginning to harvest. However, there will not be any appreciable volume out of this region until mid-April. And as we have already reported, we expect lighter than normal yields out these fields due to the adverse weather that this crop has already endured.

Romas

Supplies in the east continue to be extremely tight and most repackers are sourcing MX tomatoes to meet demand. MX crossings are down slightly this week (as explained below) which is putting upward pressure on FOB prices. Quality is good in the east but variable from MX.

Grapes

Supply levels generally steady. FOB prices are slightly higher this week compared to last week. Quality is generally good.

Cherries

The supply of cherries continue to increase slowly. FOB prices are down again this week. Quality is variable.

WEST/MEXICO

Rounds

Vine-ripes continue to cross at McAllen and Nogales. A limited supply of mature greens continues to be available this week. FOB prices are slightly higher. Fewer smaller versus larger sizes are available causing an inverted market again this week. We are seeing variability in quality and shelf-life is suspect caused primarily by the excessive heat the growing region experienced a couple of weeks ago.

Romas

As predicted last week, FOB prices are higher this week. This is due to the heat the fields went through a couple of weeks ago that caused a higher than normal rate of ripening and a flush of supplies occurred. This is causing a small gap in supplies as we wait for the fruit remaining on the vines to mature. The region has also see 2 days of rain which is not helping harvesting. We predict that FOB prices will return to Suspension Agreement minimums by the third week of March. We are seeing quality issues in some lots due to puffiness and softness which is the result of the heat.

Grapes

Grapes are crossing primarily at Nogales. FOB prices are higher compared to last week. Quality continues to be variable and generally only fair.



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Cherries

Cherry supplies are tight. FOB prices are steady to higher this week. Quality is variable and generally only fair. Color has been light.

WATERMELONS

Prices are slowly easing; Mexican supplies are the most plentiful. Mini watermelons have hit the market. Quality is very good: texture is firm and flavor is sweet. Sugar levels range from 11 to 13 Brix.
