

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending January 15, 2015



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



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MARKET OVERVIEW

The weather continues to be colder than traditional averages. This is affecting the ground temperature which is delaying growth. Although we are seeing improvement on a few commodities the weather is not improving and this is affecting more items than it is not. Broccoli is improving. Cauliflower is still behind, although slowly improving. Strawberries, lettuce, green onions, asparagus, peppers, celery and tomatoes are all being affected by the weather. We are seeing quality issues because of the cold weather as well. Melons are still very active. Warm vegetable items out of Florida were struck hard with rain and we are seeing extreme shortages with very poor quality and low yield.

Eastern and Western Vegetables: We are experiencing mild days and cooler evenings in Sonora. Culiacán (Mexico) is warmer during the day and mild in the evenings. Overall conditions in Mexico are becoming more favorable for harvest and production. We should see numbers begin to ramp up by the end of December in Central and Southern Mexico. Mexican production was dealt a couple of setbacks over the last month. Tropical storm Sandra hit central Mexico with several inches of rain and cool temperatures settling over Sonora for several nights. This slowed down production on squash and peppers. While this was not a major setback in Mexico, it has slowed down and broadened the bridge between Sonora and Culiacán production making supplies lighter than expected. To add to the issue, we have seen up to 14" inches of precipitation in South Florida. This has caused major flooding in the fields and has slowed or halted harvest production. We anticipate shortages of east coast vegetables for the next 4-5 weeks. This will put additional pressure on our production out of northern and central Mexico through the first of the year barring no additional weather events. The El Niño phenomenon has now begun to affect weather and growing conditions in the West, bringing substantial rainfall this week to Central and Southern California and Western Arizona. The current rain that is accompanied by a warming trend follows freezing temperatures that occurred during late December and early January. This weather pattern is expected to continue through March. This will cause additional issues with quality in row crop vegetables, curtailed harvesting, and supply gaps during spring and early summer. Intermittent storm activity is in the forecast through next week for Southern California and Arizona.

WASHINGTON APPLES AND PEARS

We will see the price of apples start to rise. New York will be gradually winding down on availability of Galas and Fuji's over the next 6-8 weeks. Gold Delicious and Granny Smith apples are tighter than they have been in a long time. It is likely that the Gala market will continue to increase in price. Braeburns, Jonagolds, and Cameos are all good buys.

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. Volume will drop as the weather cools.

ARUGULA

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

ASPARAGUS

Peru's peak asparagus season has finished and now the phenomena known as El Niño has had a marked impact on agriculture in Northern Mexico and in Peru wreaking havoc with temperatures and crop cycles. Peru asparagus volumes are currently 50% of the projected levels for early January, and declining quickly. It is very warm in both the northern and southern production areas and many fields are being closed due to high temperatures. Once closed they are out of production until the next harvest cycle. Mexico a very large % of acreage was delayed in being cut back to go into production due to cold weather and rain, and for that reason volumes out of Mexico's Caborca region in northern Sonora will not begin to increase until the last week of January, 2016. Asparagus volumes will be very tight overall and prices in Peru are increasing due to limited volumes and competition with the IQF plants. The European market exporters are fighting for that limited production.



FRESH DIRECTIONS



AVOCADOS

The market is weak; rain has not affected volume. Supplies are abundant, especially large sizes. Prices for 48-count and smaller fruit are a bit higher. Quality is very good: high oil content is creating buttery texture and nutty flavor.

BANANAS

Supplies and quality are good.

BERRIES:

BLUEBERRIES

Most production is out of central Mexico and the quality is good. The market is steady to slightly lower than last week. Chilean fruit is sweet with tangy notes.

BLACKBERRIES

Prices are inching down; stocks are ample, but availability is sporadic due to transfer delays from Mexico. Quality is very good: fruit is plump and juicy. Sugar levels range from 12 to 13 Brix.

RASPBERRIES

Prices are slightly higher than last week. Production is ending in California. Mexican stocks will increase over the next few weeks. Quality is average, but softness and rain damage are slight problems. Sugar levels range from 13 to 14 Brix.

STRAWBERRIES

The California market is elevated; supplies are extremely tight due to rain and cold weather. Quality problems include bleeding, bruising, decay, shortened shelf-life, soft texture, and water damage. Stocks are more plentiful in Florida and Mexico, but growers are also facing quality challenges and small size due to higher than-normal temperatures.

BOK CHOY

Availability is good.

BROCCOLI

Expect high prices for at least one to two more weeks; rain and freezing temperatures continue to slow growth and cause quality problems such as hollow core, knuckly branches, and purple beads. Most heads are small, but flavor is good.

BRUSSELS SPROUTS

Due to the recent weather conditions, there are very poor yields, and quality issues. We are seeing very high prices and a shortage in supply. We are also seeing extensive worm infestation in the Brussels. We will continue to see light product in the next few weeks, but it should get better shortly.

CANTALOUPE

Market is good and supplies have finally gotten better on the east coast but still very light here on the west coast, there is good supplies of 9's and 12's on the East coast and the smaller fruit is tighter. The overall quality of the Honduran fruit is very nice with excellent internal color and sugar content and external netting is clean with mostly a green to straw color cast. Expect supplies to get better by the end of the month on the west coast and supplies should continue to be good on the east coast going forward. Quality is excellent: sugar levels range from 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

The market will remain high for at least 10 more days. Poor weather conditions are reducing supply levels.

CELERY

Please be aware that the celery market has been greatly affected by the weather. This has been the longest shortage that we have seen in recent history. We are about 2 weeks behind schedule, we are seeing pith in the celery.

CILANTRO

The Cilantro market has improved. The colder weather will keep the market steady.

CORN

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

CUCUMBERS

EAST: Our domestic crop has all-but-ended due to the weather conditions. The quality of any remaining product is poor. The off-shore Honduras product continues to unload with more volume. The quality of the off-shore product is better. The increase in off-shore supplies has caused FOB prices to be weaker this week.

WEST: Product continues to cross at Nogales. Supplies continue to improve slightly. FOB prices are steady to lower.

EGGPLANT

EAST: FOB prices are higher this week on both grades. Quality of eggplant remains generally good.

WEST: FOB prices are higher this week as the cold weather has slowed harvesting.



FRESH DIRECTIONS



ENGLISH CUCUMBER

Steady availability in Nogales.

FENNEL

Supplies for the week will be average. Demand continues to be decent and should increase in the coming weeks. Sizing throughout the week looks to be predominately 18's and 24's with very nice quality.

GARLIC

Market remains extremely tight. We will be using Spanish 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

We have finished the California fruit and are battling on imports as the volumes are very light and demand far exceeding supply coming in from Peru and Chile, the majority of the volume is greens and very minimal reds. The volumes are going to continue to be very light and demand exceeding supply probably through the 20th of this month as the vessels lighter in volume than normal as the Chilean crop is about 2 weeks later this year than last. The overall quality of the fruit is good with size on the smaller side and sugars fairly good to fair and will continue to get better as we go forward. Sugar levels range from 18 to 20 Brix.

GREEN BEANS

Availability has improved significantly; prices have declined.

GREEN CABBAGE

Green cabbage supplies remain below expected volume due to smaller sizing and lighter weight heads in fields. Quality is nice.

RED CABBAGE

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

GREEN ONIONS

EXTREME MARKET WITH SOME AOG. We are seeing a shortage in 4/2 ct green onions and we will be subbing 4/12 ct bunched. We are seeing very short supply to no supply with several growers.

HONEYDEW

Market is very strong as Mexico volume is light and the imports are trickling in on both coasts but better supplies

on the east coast. The overall quality of the Mexican product has been very nice and some of the offshore fruit showing some bruising and checkerboard color but internal quality is good with good sugars and nice firm meat. Expect the supplies to also increase by the end of this month and prices should start to ease. Quality is excellent. Sugar levels range from 10 to 11 Brix.

KALE (GREEN)

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

KIWI

Good supply of CA. Quality is good.

LEMONS

Market is steady and strengthening as we are getting close to finishing dist. 3 and should be finished by the end of the month and will continue out of dist. 1 through May. We are also size picking minimal volume out of dist. 2 but not any major volume yet. The overall quality is good with very good color and internal juice content and with the cold nights fruit strength is very good right now. We expect the market to continue strong and we hope the rains continue to help size up the dist. 2 fruit which will help us through the summer since we started about two weeks earlier than normal on our dist. 1 fruit and finished the dist. 3 fruit about 4 weeks earlier than normal the summer months are probably going to be tough as far as supply.

LETTUCE:

GREEN AND RED LEAF

The market is climbing; volume is falling. Rain is forecast all week; harvesting delays and quality problems are anticipated.

ICEBERG LETTUCE

With two weeks of ice and rain, we are seeing another rise in the lettuce market. Prices are very high and we are short supply. We are seeing light weights as well.

ROMAINE

The market is climbing. This week's rain will reduce supplies and cause more problems such as epidermal blistering and peeling throughout the industry.

ROMAINE HEARTS

Supplies are much better and quality is good.

LIMES (PERSIAN)

The market is inching up. Supplies will continue to decrease as the winter progresses.



FRESH DIRECTIONS



MANGOS

Supply is still very active and prices are moderate. There is fair supply on red mangos. We should see this improve in the next few weeks.

NAPA

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

ONIONS

Demand has continued to improve and pricing on all three colors is expected to increase. This is a trend we expect to continue over the next several weeks. Mexican onions are expected to cross through South Texas at the end of the month, however, we expect most of this supply to be put into 40# cartons for retail. 50# sacks will likely begin to show up during the first-second week of February.

ORANGES

We have been battling some cold nights since the second week of December and have so far gotten through with minimal damage we are seeing some ice mark but as far as internal freeze damage everything is looking pretty good. The temperatures have been 27-30 for the most part and with wind machines and water we have been very lucky also a low inversion layer and temperatures dipping down to the lowest around dawn we have escaped damage so far. The overall quality of the fruit is very good with full color, excellent sugar content and firm rind. We expect the fruit to stay strong as the cold weather helps to strengthen the fruit. The overall market is good with good demand and export starting to pick up in volume after holidays also with the rains we have had so far is sizing up the fruit and we are peaking on 88's 72's and 113's and we will see the fruit continue to size up going forward. We have been getting some steady rains and the forecast is for the rains to continue for the next 7-10 days which is a blessing for all. Sugar levels range from 12 to 13 Brix.

PARSLEY (CURLY, ITALIAN)

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

GREEN BELL PEPPER

EAST: Quality and shelf-life continue to be a concern as growers continue to report issues from bacterial pressure to bruising. Accordingly, inventory levels should continue to be kept as tight as possible. FOB prices are generally steady to higher with a forecast of continued upward pressure.

WEST: FOB prices are much higher this week as the cold

weather has caused a decrease in supplies. Demand is good. Quality is generally good.

JALAPEÑO PEPPER

EAST: FOB prices are higher this week due to increased demand and limited supplies

WEST: FOB prices are higher this week and we expect FOB prices to continue to rise through the weekend. Quality remains good.

RED PEPPER

Although the market remains elevated, it is starting to ease; supplies will increase through the month. Quality is good: skins are smooth and flavor is peppery, yet sweet.

PINEAPPLE

Prices are climbing in both regions; supplies are tightening. Quality is good, but mold is a slight concern. Sugar levels range from 15 to 16 Brix in Costa Rica and from 13 to 14 Brix in Mexico.

POTATOES (IDAHO)

Demand is strong across the board on both Norkotah and Burbank varieties. We have seen pricing increases on all pack sizes, and we expect this to continue into next week. The Norkotah supply will finish up over the next 2 months, and we should see a more stable market with higher FOBs once growers are shipping Burbank's exclusively.

RADISHES

EXTREME MARKET. Radishes are almost nonexistent. Florida should start production in about 15 days and this will help take some heat off of the CA market.

SALADS & BLENDS

The market is climbing. This week's rain will reduce supplies and cause more problems such as epidermal blistering and peeling throughout the industry.

SNOW AND SUGAR SNAP PEAS

Snow and sugar snap peas are steady and quality is good.

SPINACH (BUNCHED)

Supply is good. There are some with weaker texture and inconsistent leaf-sizing.

SPINACH (BABY)

Baby Spinach and Clipped Spinach supplies are good. Quality and volume are good. The market has come off a bit, but still staying strong.



FRESH DIRECTIONS

SPRING MIX

The market is firm; rain is reducing supplies. This week's rain is expected to increase respiration rates, cause premature pinkening, and reduce shelf-life.

GREEN SQUASH

EAST: Supplies are tighter this week causing FOB prices to rise. Large sized squash continue to be extremely tight. Quality and shelf-life is variable and suspect but is better than the yellow squash.

WEST: Crossings continue at Nogales. A few more supplies have caused FOB prices to remain steady with downward pressure. Quality is good.

YELLOW SQUASH

EAST: Supplies remain extremely tight to non-existent and not near enough to meet demand. Homestead is the primary growing region and their acreage is down. FOB prices are steady to higher for both medium and fancy grades. Quality and shelf life is variable and generally fair at best.

WEST: The cold weather reported in last week's market report did more damage to the yellow squash crop than any other dry vegetable commodity. It will affect the volume of supplies into February. FOB prices are higher this week and are expected to remain high for the rest of the month. Crossings continue at Nogales.

TOMATOES

EAST

Rounds

The report on eastern round tomatoes is basically the same as last week except sizing is even on the smaller side this week as growers are in second and third pickings of old fields as we await fruit in the newer fields to mature. The excessive heat earlier in the growing season and the excessive rains and cloud cover over the past several weeks has taken a heavy toll on yields and quality. We have reported these weather events over the past several weeks. The weather has put an earlier-than-normal end to the growing season in the Palmetto/Ruskin region and the yields out of the Immokalee and Homestead regions are down sharply. The small sizing has caused the FOB prices of 5x6 and larger to increase while the price of 6x7s has decreased. The FOB prices of 6x6s have remained generally unchanged. Quality and shelf-life are variable and suspect. Additional supplies from newer fields continue to be delayed due to lack of sunshine, cooler than normal temperatures and more than normal rainfall. It may be February before volume out of the new fields in the east is sufficient to appreciatively put down-

ward pressure on FOB prices. The Mexican crop is also behind but should precede the east with volume and we expect the west to be the first to begin to put downward pressure on national FOB prices.

Romas

Supplies of romas remain tight and will not meet demand. Quality and self-life is variable and suspect and we are seeing a wider than normal range in FOB prices. Acceptable quality is demanding the higher prices. Western growers continue to slowly come online which has put slight downward pressure of FOB prices in the east.

Grapes

Supply and demand are pretty much in equilibrium causing FOB prices to remain generally steady from last week. Quality is fair to good; shelf-life is suspect.

Cherries

FOB prices are steady to slightly down compared to last week. Quality is variable.

WEST/MEXICO

Rounds

Vine-ripes are crossing at McAllen and Nogales. Demand is good. The yield of rounds is slowly increasing as growers recover from the extreme temperatures of last weekend. FOB prices of all sizes are down slightly from last week.

Romas

The increased volume of romas is greater than the increase of rounds as more growers continue to come on line. FOB prices are down on all sizes with the smaller sizes showing the greatest decreases.

Grapes

Supplies are better causing a drop in FOB prices. Grapes are crossing primarily at Nogales.

Cherries

A slight increase in supplies is putting slight downward pressure on FOB prices.

WATERMELONS

Prices are high. Supplies will increase in Florida, Mexico, and offshore in approximately two weeks. Seeded fruit remains extremely tight. Quality is very good: texture is firm and flavor is sweet. Sugar levels range from 11 to 13 Brix.