

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending January 29, 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	High to Extreme	Good	↔
Green Beans	High	Good	↔
Red Bell Peppers	High	Fair to Good	↔
Yellow Squash, Zucchini	Extreme	Fair to Good	↔
Green & Red Seedless Grapes	Very High	Good	↔
Cantaloupes, Honeydew	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 lettuce, romaine and cauliflower, we are still in a demand exceeds supply situation on green onions, squash, and asparagus. This past week the strawberry market hit yet another, demand exceeds supply. Warm veg items out of Florida were struck hard with rain and we are seeing extreme shortages with very poor quality and low yield. We are experiencing mild days and cooler evenings in Sonora. Culiacan 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 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 settled 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 Culiacan 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.

WASHINGTON APPLES AND PEARS

The market is low; Washington storage stocks are plentiful. Prices for 72-count and larger sizes are a bit more than the market for small fruit. Sugar levels are high, measuring 15 to 18 Brix (sugar to acid ratio). Quality is excellent: texture is crunchy and flavor is sweet. The D'Anjou market is steady. Bartlett prices are starting to rise; the season will end in a week or two. Small sizes dominate storage stocks.

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

EXTREME MARKET: This is an update on the Asparagus supply situation as of January. Peru's peak asparagus season has finished and now the phenomena known as

El Nino has had a marked impact on agriculture in Northern Mexico. Peru's asparagus volumes are currently 80% 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. In Mexico, a very large % of acreage was delayed to go into production due to cold weather and rain. 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, and prices in Peru are increasing due to limited volumes and competition with the IQF plants. In addition, the European market exporters are fighting for that limited production. Asparagus arrivals from all sources will be reduced by 80% and it is projected to stay this way until the first week in February. Expect very high prices and extreme shortages.

AVOCADOS

The market is weak. Stocks are ample, especially large sizes. It's a great time to promote avocado products for the upcoming Super Bowl. Quality is very good: texture is buttery and flavor is nutty.



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BANANAS

Supplies and quality are good.

BERRIES: BLUEBERRIES

Most production is out of central Mexico and the quality is good. Quality is very good: fruit is sweet with tangy notes.

BLACKBERRIES

Steady supplies and good quality. Sugar levels range from 12 to 13 Brix.

RASPBERRIES

We should see steady volume through the end of the year and quality is good. Sugar levels range from 13 to 14 Brix.

STRAWBERRIES

The market is being affected by the weather. We are seeing some quality issues including bruising, mildew and the product being overripe. Mexico is about 35% of what it was last year. CA is about 65% and we do not know with the current rain in Florida how much of a loss we will see there. Strawberries are now back in a demand exceeds supply. Prices are very high and we are seeing extreme pro rates. Raspberries, blues and blacks are a better option.

BOK CHOY

Availability is good.

BROCCOLI

The Broccoli market is improving and markets are remaining strong. Quality has improved, prices are better.

BRUSSELS SPROUTS

We are seeing improvement in this market. Prices are steady.

CANTALOUPE

Market has eased as volumes have increased on both the west and east coast on offshore fruit, the overall quality is good with some fruit showing some soft spots here and there but overall pretty solid fruit. The internal color and sugar content are very good with a mostly green cast and rough netting. Expect good volumes going forward which should keep the market fairly steady and we do not anticipate any spikes in the market in the coming weeks. The size structure is heavier to 9's and 12's with limited numbers of 15's and 18's. Quality is excellent: sugar levels range from 10 to 12 Brix.

CARROTS

EXTREME MARKET ON JUMBOS. 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. Prices are high and we are seeing extreme shortages. We do expect to see improvement in 2 to 3 weeks.

CAULIFLOWER

Supplies are good. Quality is good and prices are back to normal.

CELERY

EXTREME MARKET. 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, and we are seeing pith in the celery. We are still seeing very high prices and severe shortages in product. We anticipate another 2 to 3 weeks of this market.

CILANTRO

The Cilantro market is limited. 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 ended. The off-shore Honduras product continues to unload. The quality of the off-shore product continues to be good. FOB prices are generally steady to down.

WEST: Product continues to cross at Nogales. FOB prices are seeing downward pressure as more supplies become available.

ENGLISH CUCUMBER

Steady availability in Nogales.

EGGPLANT

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

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 will be using Spanish



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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

Market is still demand far exceeds supply on both colors on the west and east coast, the next west coast vessel is going to unload Friday/Saturday and there is not many grapes on this vessel and the next vessel will not arrive until Jan. 31st so we are going to continue to be in demand exceeding supply here on the west coast until the first week of February. The east coast is getting better as there is a vessel unloading this Friday and one on the 26th, so things will be getting better as far as supply on the east coast but still going to be very tight and a strong market due to the lack of supplies over the last month. The overall quality of the fruit is good to fair with smaller than normal berry size and sugar content is good to fair on reds and greens. Sugar levels range from 18 to 20 Brix.

GREEN BEANS

Steady availability in Florida and Nogales. A wide range in quality and price exists for Nogales shippers.

GREEN CABBAGE

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

GREEN ONIONS

EXTREME MARKET WITH SOME AOG. We are seeing severe shortages on product this week. Prices will be at open market. We are hoping to see more product in the next week.

HONEYDEW

Market very strong as the off shore volume has not yet hit its stride and Mexico volume is a little light right now, we will start to see better volumes come in from offshore in the coming weeks which should help ease the market a bit. The overall quality is good to fair with some of off-shore fruit showing some soft spots as well and internal condition is good with very good sugars and nice internal color. Quality is excellent: fruit is juicy. 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 strong as we have finished dist. 3 and are dependent upon dist. 1 and light volumes of dist. 2 at this point, the overall quality of the fruit is very good with excellent color and juice content, we expect the quality to keep strong but we could see some issues due to the wet weather but we will keep you posted. The market will continue strong and will strengthen going forward as we started about 3 weeks earlier than normal out of dist. 1 and demand has been very good, we are expecting the smaller fruit 165's and smaller to strengthen the most as we will see some bigger fruit out of dist. 2 in the coming months. The summer is going to be very tight and prices will be similar to stronger than last summer due to the earlier than normal start out of dist. 1 and the pressure to pick dist. 2 earlier to fulfill demand.

LETTUCE: GREEN AND RED LEAF

Supplies and quality are good.

ICEBERG LETTUCE

With two weeks of ice and rain, we saw another rise in the market. We are seeing some better weather which has helped. Prices are moderate and the market remains steady, we are seeing some weather related quality issues.

ROMAINE

Supplies are good and quality is average. Rain has affected the harvest and we are seeing epidermal blister and peel from cold weather.

ROMAINE HEARTS

Supplies are much better and quality is good.

LIMES (PERSIAN)

The market is elevated. Stocks are decreasing; seasonal harvesting is in decline. Expect high prices until spring production begins in April.

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.



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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 has increased, as expected. This is a trend we expect to continue over the next several weeks.

ORANGES

Market steady as the rains have kept us out of the fields the last few days, but we are expecting some warmer temperatures the next few days which should dry things out and possibly pick Thursday and then another storm will be hitting us Friday and then clearing out on Sunday and clear for next week so we should get back to clear weather and normal picking schedule. The overall quality of the fruit is excellent right now as the cold weather we have had keeps the fruit strong and sugars and color are excellent. The wet weather will probably cause some problems in the coming weeks if we get temperatures in the 60's or 70's as puff and crease will start to show its head as well as clear rot but we will keep you posted as we see issues popping up. Quality is good: flavor is sweet and tangy. 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: The volume of peppers is generally steady this week. However, we expect volume to decrease over the next couple of weeks as we feel the effects of the storms. 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

WEST: FOB prices are steady with downward pressure. Demand is good. Quality is generally good.

JALAPEÑO PEPPER

EAST: FOB prices are lower this week.

WEST: FOB prices are steady this week. Quality remains good.

RED & YELLOW PEPPER

The market remains high; supplies are tight due to cold weather. Expect volume to increase over the next two weeks. Quality is good: skins are smooth and flavor is peppery, yet sweet.

PINEAPPLE

Prices are rising; expect low volume through mid-February. 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 the next week and this will help take some heat off of the CA market.

RED CABBAGE

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

SALADS & BLENDS

Prices are starting to inch back down to normal levels. Raw product supplies are increasing in the Arizona desert region. Frost-related quality issues persist.

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.

SPRING MIX

The market is stable; stocks are adequate despite recent low temperatures. Overall quality is very good: all components are being packed.

GREEN SQUASH

EAST: Supplies are tight again this week and FOB prices remain high. 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. FOB prices remain high but generally steady. Quality remains generally good.



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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 remain high and generally steady for both medium and fancy grades. Quality and shelf life is variable and generally fair at best.

WEST: The cold weather 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 remain high this week but we are seeing some downward pressures. Crossings continue at Nogales.

TOMATOES

EAST

Rounds

The weather continues to take its toll on tomato yields out of eastern fields. Supplies are critically short but we are seeing a slight improvement in the sizing. The FOB price of 5x6s remains unchanged while the price of 6x6s and 6x7s are both a couple of dollars higher. The spread in the cost between sizes has narrowed this week but there is still a \$6 difference between the cost of 5x6's and 6x6's. If sizing is not critical to a customer, it may be wise to direct them to the smallest size that they can utilize. Quality and shelf-life are variable and suspect. Even if the weather begins to cooperate, it will be February before volume out of the new fields in the east is sufficient to appreciatively put downward 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

Romas continue to be the one bright spot. The increased volume from MX has caused the FOB prices on both coasts to fall. FOB prices have fallen again in the east as a result of the increased supplies from the west.

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

After falling last week, the FOB price of cherry tomatoes has risen this week due to a decrease in supplies as a result of the weather. Quality is variable.

WEST/MEXICO

Rounds

Vine-ripes are crossing at McAllen and Nogales. Supplies are slowly increasing. Demand is currently generally soft. We are seeing some quality issues primarily in the form of skin defects and coloring.

Romas

As mentioned above, the Mexican roma market is the one bright spot this week as supplies continue to increase and FOB prices are down again on all sizes. In fact, prices are beginning to approach Suspension Agreement minimums. Demand has been generally light.

Grapes

Grapes are crossing primarily at Nogales. After falling last week, FOB prices are higher this week as supplies become tighter due to cooler weather. Quality continues to be variable.

Cherries

Like the grape tomatoes, due to the weather, cherries are slightly higher this week after falling last week.

WATERMELONS

The market is elevated. Stocks are starting to increase in Florida, Honduras, and Mexico. Seeded fruit is extremely tight. Quality is very good: texture is firm and flavor is sweet. Sugar levels range from 11 to 13 Brix.