

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending March 25, 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	Moderate	Excellent	↑
Pineapples	Moderate	Good	↔
Oranges, Navels	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	↔



FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending March 25, 2016



MARKET OVERVIEW

The weather in the desert is hot. We are seeing quality issues with product resulting from the heat and the end of the season. Lettuce is showing damage from high levels of heat. 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. It has been raining in Salinas and we do expect to see quality issues and product to tighten up.

WASHINGTON APPLES AND PEARS

Washington storage prices remain low; large sizes are a bit tighter than small fruit. 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. The Washington Pear market is near the bottom; storage supplies are ample, especially 100- to 120-count sizes. Quality is excellent: flavor is subtly sweet with hints of lemon/lime. Sugar levels average 12 Brix.

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

Mexican prices are weak; volume is high. California stocks are increasing; the season will continue through October. Quality is very good: flavor is nutty.

BANANAS

Supplies are much better. Quality is good.

BERRIES: BLUEBERRIES

Prices are beginning to rise. Chilean supplies are plentiful, but the harvest is starting to wind down. The Mexican season is at its peak. The California season will begin in mid-April. Overall quality is very good: fruit is sweet, yet tangy.

BLACKBERRIES

Poor weather in Mexico has reduced volume; the market is climbing. Quality is average: rain has caused minor issues. Sugar levels range from 12 to 13 Brix.

RASPBERRIES

Although overall availability is tight, the market has stabilized. Supplies will reach adequate volume after the Salinas/Watsonville season starts. Quality is very good: fruit is plump, juicy, and sweet. Sugar levels range from 13 to 14 Brix.

STRAWBERRIES

The market is slightly higher than last week due to more West Coast rain and increased Easter demand. California stocks are adequate despite the wet weather. Rain-related quality problems include bleeding, bruising, decay, water damage, and wind scarring. Florida weather has been much drier, keeping volume high; heat related issues include bleeding, bruising, and softness.

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

Supplies are light and prices are high.

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.



FRESH DIRECTIONS



CARROTS

EXTREME MARKET ON JUMBOS AND STICKS CONTINUES. 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 in CA region.

CAULIFLOWER

Market is good, supplies are less than normal. 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. We should see this improve in a few weeks.

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 at the end of that crop. The quality of the off-shore product continues to fall and shelf-life is also suspect. Our Florida growers have begun to harvest and we expect more volume from these fields over the weekend or early next week.

WEST: Product continues to cross at Nogales. FOB prices are generally steady to down compared to last week. We expect the Baja crop to begin harvesting by the end of March.

ENGLISH CUCUMBER

Limited availability and high prices.

EGGPLANT

EAST: FOB prices are higher as supplies decrease. 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. The weather has slowed the growth rate in CA and we will need to use import garlic until we can harvest more CA product.

GINGER

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

GRAPES

Market has strengthened on reds as we are done on flames and have transitioned to Crimsons, but very light supplies of crimsons, there is a some arriving Tomorrow on both coasts that will help with supplies but we will not see much fruit after tomorrows arrivals until around the 28th of March so it will stay tight and very strong. The greens are a different story as there is ample supplies of fruit but a wide range in quality there for and wide rang in prices as well. The overall quality of the crimsons will be better than the flames but we need to keep in mind that they did have some rains in Chile and there will be some lots that could have some nesting issues especially on tight bunches. Quality is very good: sugar levels range from 17 to 20 Brix.

GREEN BEANS

Continued tight availability in Florida; prices remain at the extreme. Green beans will be available in Nogales through the end of March, followed by a quick transition to the Coachella Valley in early April.

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, Easter pull will make these even tighter next week.

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. Sugar levels range from 10 to 11 Brix.

KALE (GREEN)

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



FRESH DIRECTIONS



KIWI

Good supply from CA. Quality is good.

LEMONS

Market is steady and trying to strengthen on 165's and larger but demand has been a bit sluggish. Again we have been out of the fields due to the rains but are now back to harvesting and should be good going forward. 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. We will be harvesting in dist. 1 through April and then we will be fully dependent on dist. 2 fruit, so things will continue to strengthen as we go forward and into the spring and summer months.

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)

The market is expected to rise over the next month; the current season is ending, while the new crop harvest is just getting underway. Large size fruit is limited. Quality is average: scarring is a slight problem in current stocks; new crop supplies have thicker rinds, but less juice at this stage of the season.

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 reports of some internal problems.

ONIONS

Overall demand is slow throughout the country and Mexican supplies are beginning to cross heavier. As a result, the overall market has a sluggish feel and pricing on yellows has started to come off. Red onions have remained a bit more constant but Mexico is expected to start crossing reds within the next week. Although we have seen Mexican white onions crossing, this market re-

mains very firm as several growers in Idaho are finishing their white onion crop. It is likely the overall onion market will continue to have a sluggish feel as we finish Idaho and transition into Texas.

ORANGES

Market has strengthened as we have had some rains that had kept us out of the fields the last few days but we are back to normal harvesting and we should be in good supplies going forward. The next storm is a very light chance of rain Sunday/ Monday but should not cause us any problems. The overall quality is good with some fruit showing some puff and crease and some separation as well. The fruit eats like candy right now with excellent sugar and juice content. 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 are not abundant but weak demand is causing downward pressure on FOB prices on all grades and sizes. Quality has been generally good.

WEST: Very little supply is putting upward pressure on all grades and sizes coming out of Nogales. Quality is variable.

JALAPEÑO PEPPER

EAST: Supplies are tighter and FOB prices are higher this week.

RED & YELLOW PEPPER

Prices are inching down; supplies are becoming more plentiful. Quality is very good: skins are smooth and flavor is peppery, yet sweet. Domestic harvesting is scheduled to start in late April/early May in Coachella, CA.

PINEAPPLE

Prices are steady; stocks have begun to increase to meet Easter demand. Quality is very good: fruit is firm, yet juicy with tropical flavor. Sugar levels range from 13 to 16 Brix.

POTATOES (IDAHO)

Demand has exceeded supply on large size cartons this past week. Most growers have finished their Norkotah supply for the season, with only a few still shipping them. Burbanks are running smaller than Norkotahs right now, so we expect larger sizes to remain tight. Norkotah supply will finish up over the next month, and we should see a more stable market with higher FOBs once growers are shipping Burbank's exclusively.



FRESH DIRECTIONS



RADISHES

Market is steady in CA. Great quality.

SALAD BLENDS

The market is unchanged. Hot weather has 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 (BUNCHED)

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

The market is stable; volume is big. Quality is very good, but insect pressure, mildew, and yellowing are minor problems in some lots.

GREEN SQUASH

EAST: FOB prices are steady to down compared to last week. Quality and shelf-life is variable.

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

YELLOW SQUASH

EAST: FOB prices are generally steady from last week. Quality and shelf life remain generally fair to poor due to the adverse weather that the crop has endured.

WEST: FOB prices are steady this week. Quality is variable but good quality can be found. Crossings continue at Nogales.

TOMATOES

EAST

Rounds

The supply of round tomatoes continues to be very short out of Florida due to the adverse weather the fields have gone through all winter. As mentioned last week, the weather appears to have finally broken in Central and South Florida but the damage has already been done. Yields continue to be down and, although some good fruit can be found, quality is variable. Little movement from last week's FOB prices. As reported last week, a few growers in the Ruskin area are beginning to harvest. However, there will not be any appreciable volume out of

this region until mid-April. Therefore, we do not expect FOB prices to drop on Florida rounds for the next several weeks unless additional supplies from other growing regions begin to apply downward pressures.

Romas

Supplies in the east continue to be extremely tight and most repackers are sourcing MX tomatoes to meet demand. MX crossings continue to be down this week which is putting upward pressure on eastern product. Quality is good in the east but variable from MX.

Grapes

A critical shortage of grape tomatoes in both the east and the west has caused FOB prices to rise dramatically from last week as growers are selling out every day. In fact, FOB prices have risen above trigger points of contracts and will be enacted. Demand is exceeding supplies. Relief will not occur until we move into the new fields in Central Florida in April. Quality is generally good but becoming more variable.

Cherries

FOB prices are generally steady with some downward pressure. Demand is weak. 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 generally steady from last week for the 5x6s and 6x6s and are down slightly for the 6x7s. We continue to see variability in quality and shelf-life.

Romas

FOB prices are generally steady from last week. We are in a small gap situation caused by excessive heat several weeks ago that caused the fruit on the vine to ripen more quickly two weeks ago. We predict that FOB prices will return to Suspension Agreement minimums in the next week or two as the current fields stabilize to a more typical harvesting cycle and as the Baja growing region begins production in a light way. We are seeing quality issues in some lots due to puffiness and softness which is the result of the heat.

Grapes

As mentioned above, a critical shortage of grapes has developed in both the east and the west. Growers are selling out quickly every day. Demand is exceeding supply. Quality continues to be variable and generally only fair. We do not see any appreciable relief in this market in the west until Baja begins with good volume which we expect will not be until May.



FRESH DIRECTIONS



Cherries

Cherry supplies are light as is demand. FOB prices are seeing downward pressure. Quality is variable and generally only fair. Color has been light.

WATERMELONS

The market has inched up since last week due to an unexpected storm in Mexico. Supplies should return to normal levels this week. Quality is very good: texture is firm and flavor is sweet. Sugar levels range from 11 to 13 Brix.
