

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending April 15, 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	Low to Moderate	Good	↓
Green Beans	Moderate to High	Excellent	↓
Green Bell Peppers	Moderate to Extreme	Good	↓
Red Bell Peppers	Moderate	Good	↔
Yellow Squash	Moderate	Good	↓
Zucchini	Low	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 D'Anjous, Bosc Pears	High	Good	↑
Bartlett Pears	Moderate	Good	↔



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MARKET OVERVIEW

Most commodities have transitioned back to Salinas and some growers are finishing up in the desert this week. Blueberries and strawberries are showing quality issues and high prices. Garlic is also in short supply. Jumbo carrots from CA continue to have sizing issues and we are seeing relatively no product from this region. We anticipate this market to be up and down until July. Green leaf, lettuce and spinach are plentiful!

WASHINGTON APPLES AND PEARS

Overall demand is steady, supplies are very tight on small sizes all varieties & lower grades, especially 125/138 size. Expect this scenario to continue through August. Volumes continue to be in Premium grade & smaller sizes are more readily available. Red delicious, grannies and golds will remain until new crop. Sugar levels average 11 to 14 Brix (sugar to acid ratio). Demand on pears exceeds available supplies on 110's and smaller. This will also continue through the summer.

ARTICHOKES

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

ARUGULA

Supplies of both baby and wild arugula are good. Quality is fair.

ASPARAGUS

We are seeing good supply on smaller sizes. Quality is good. Starting to see more Peru product. The market is firming up and prices are up this week from last.

AVOCADOS

The California market is slightly higher than Mexican prices; stocks are increasing. Quality is very good: oil content ranges from medium to high, creating creamy texture and nutty flavor.

BANANAS

Supplies are much better. Quality is good.

BERRIES: BLUEBERRIES

The market is elevated. Production has ended in Chile. Harvesting has begun in Florida, but supplies are tight. Mexico will remain the primary source until domestic

volume increases. High prices are forecast through April. Overall quality is good: fruit is sweet, yet tangy.

BLACKBERRIES

Prices have eased a bit. Although stocks are limited, they are starting to increase. Quality is good: sugar levels range from 12 to 13 Brix. The California new crop season will start in May.

RASPBERRIES

Prices are slightly lower than last week. Mexican stocks are sufficient. California volume will increase when the Salinas/Watsonville season begins in mid- to late April. Quality is very good. Sugar levels range from 13 to 14 Brix.

STRAWBERRIES

California prices are expected to continue inching up through Mother's Day, but overall availability is adequate. Rain might diminish volume next week. The seasons in Florida and Mexico have ended. Quality is very good: berries are plump and juicy..

BOK CHOY

Availability is good.

Broccoli

Prices have eased. Although the Arizona/ California desert season ended, supplies are sufficient in Salinas and Santa Maria, California as well as Mexico (into South Texas). Domestic quality is good: branchy heads are a minor problem.

BRUSSELS SPROUTS

Supplies are light and prices are high. Demand exceeds supply. Quality is fair.

CANTALOUPE

Market is steady with generally good supplies of 9's and 12's and lighter supplies of 15's on both coasts, the



FRESH DIRECTIONS



overall quality is good to fair with good internal color and sugar and eating good. The netting is mostly even and a mostly green to straw cast and firm. Expect the market to keep steady as supplies will continue through April and hopefully not have any gaps between offshore and domestic fruit. We are expecting to start Cantaloupe in the California desert around the first week of May and by the third week of May should be in full production out of the California and Arizona deserts. Sugar levels range from 12 to 13 Brix.

CARROTS

EXTREME MARKET ON JUMBOS AND STICKS CONTINUES IN THE CA GROWING REGION. Availability is below average for jumbo carrots. 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. We hope to see improvement in mid-April but expect this to last well into June.

CAULIFLOWER

Market is good; supplies are less than normal. Quality is good.

CELERY

Plentiful supplies, quality is fair to good.

CORN

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

CUCUMBERS

EAST: Our Florida growers are in full production and supplies are strong. FOB prices are low with even more downward pressure. Quality is generally good.

WEST: Product continues to cross at Nogales at good levels. FOB prices are down on all sizes and grades. Baja has begun to harvest with light volume. We expect FOB prices to remain low through April.

ENGLISH CUCUMBER

Limited availability and high prices in Nogales. New crop English cucumbers from Western Canada are now available.

EGGPLANT

EAST: Supplies continue to be tight and FOB prices are generally steady. Quality of eggplant remains generally good.

WEST: Supplies will remain generally tight until the desert begins to harvest around mid-April. FOB prices are generally steady.

FENNEL

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

GARLIC

The market is very short in supply and very high in price. 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 when compared to ginger from Brazil.

GRAPES

Market has eased on reds very strong on good greens and there is lots of greens around that have some issues the fruit that is clean is on the higher side. The overall quality on the crimsons is good with some lots showing some lighter color but overall the fruit is much stronger than the flames were. Expect the market to keep steady on reds and continue to climb on greens as most shippers clean up the rougher fruit. We will be finishing the Chilean fruit around the end of the month and then we will start the California desert and Mexico, which looks to be a very nice crop shaping up in both areas. Quality is very good: green seedless sugar levels range from 17 to 18 Brix, while red seedless run from 18 to 20 Brix.

GREEN CABBAGE

Green cabbage supplies remain below expected volume due to the winter season ending and a slow start in CA. 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

Plentiful supplies and quality is good.

HONEYDEW

Market has eased a bit as supply has increased but sizes are on the larger side and smaller fruit is tighter, the overall quality of the fruit is very good with excellent sugars and internal color, the external condition is very clean with a green to cream cast. Expect the market to stay mostly steady for a couple of weeks and then start to strengthen up as offshore supplies ease off a bit. We will start California desert dewes will start around the second week of May followed by the Arizona desert dewes. Quality is excellent: fruit is juicy. Sugar levels range from 10 to 11 Brix.



FRESH DIRECTIONS



KALE (GREEN)

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

KIWI

Good supply from CA. Quality is good.

LEMONS

Market is starting to get stronger with good demand across the board, we are going to be finishing earlier than normal in dist. 1 probably go through April and possibly a little beyond as the crop is lighter and demand has been very good. We are packing dist. 2 fruit now mainly size picking the larger fruit and leaving the smaller fruit on the tree to size up. The overall quality is good with some lots showing clear rot due to the rains and the warmer weather which helps promote mold spores in the field. We do expect the market to continue to strengthen each week going forward due to demand and the lighter dist. 1 crop nearing its end.

CALIFORNIA LETTUCE: GREEN AND RED LEAF

Prices are low. Stocks are plentiful in all areas; the desert season is nearly over. Quality is very good: insect pressure is a slight problem in Huron.

ICEBERG LETTUCE

Prices are weak, but forecast to inch up next week when the desert season ends. Internal burn and rib blight are minor issues in Yuma; quality is better in California.

ROMAINE

The market is near the bottom. This is the last week of production in Yuma. Growers are harvesting in Huron and Salinas. Quality is very good. Fringe burn, rib blight, and seeder are issues in Yuma; insect pressure is a problem in Huron.

ROMAINE HEARTS

Supplies are good and quality is good.

LIMES (PERSIAN)

Lime prices will be elevated over the next two to three weeks. Growers in the main harvesting region of Veracruz, Mexico are in the lowest production period of the year.

MANGOS

Supply is still very active and prices are moderate to high. The market should come down mid-April.

NAPA

Market is still very active. Demand is good, prices are moderate.

ONIONS

Demand has picked up and Texas and Mexico shipments have been extremely high. This has forced price in this region to firm up. Growers are finishing in the northwest but because of the overall shipments being pulled from the south they are being forced to keep their prices lower to compete and clean up. Red onions have also remained very firm despite the fact that Mexico has been crossing heavier.

ORANGES

Market is steady with good supplies of most sizes as we have had some warmer weather come in and we are trying to get some of the non-gibed fruit off the tree. Rain is in the forecast for the upcoming weekend so we will be harvesting and should have good supplies and the weather should not cause us any supply issues. The overall fruit quality is good to fair some blocks showing some clear rot and brown rot due to the rains and then warmer than normal temps in the past. Warmer than normal temps on the horizon will cause puff along with some internal separation. The internal juice and sugar content is excellent. We will be going with navels through May and also start some Valencia's around the middle part of April. Quality is very good: 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 is fair due to the heat.

GREEN BELL PEPPER

EAST: The green bell market is the one dry vegetable commodity that remains high and active due to a continued shortage of supplies. FOB prices remain strong on all sizes and grades. We do expect new fields to provide more supply sometime next week. Therefore, we should see these FOB prices begin to fall. Quality has been generally good.

WEST: Demand is soft. Supplies generally remain tight. However, the desert fields are seeing an increase in yields and we expect them to continue to improve. Quality remains suspect but is improving.

JALAPEÑO PEPPER

EAST: Supplies are tight and FOB prices remain strong this week.

WEST: FOB prices are down again this week as the northern production continues to increase.

RED & YELLOW PEPPER

The market is stable. The California season will begin in early May. Overall Mexican supplies have increased, but high heat has caused some quality problems such as dehydration and early breakdown.



FRESH DIRECTIONS



PINEAPPLE

The market is slightly higher than last week; supplies will remain fairly limited for the next one to two weeks. Quality is very good: fruit is firm, yet juicy with tropical notes. 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 Burbanks exclusively.

RADISHES

Market is steady in CA. Great quality.

SALAD BLENDS

Hot weather persists in the desert region. Heat-related problems are being monitored by inspectors.

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 fair.

SPINACH (BABY)

Baby Spinach and Clipped Spinach supplies are good.

SPRING MIX

Prices are steady; stocks are plentiful. High temperatures in Yuma have caused occasional discoloration/yellowing. Crews are working to keep these issues out of final packs. Some growers have begun limited harvesting in the Salinas Valley.

GREEN SQUASH

EAST: FOB prices are down again this week. Quantity and quality continue to improve.

WEST: Crossings continue at Nogales. FOB prices remain at or close to floor levels. Quality remains generally good. We expect prices to remain low until the middle of April when they may begin to rise due to a small gap in supply.

YELLOW SQUASH

EAST: Hot weather has sped-up the growth of squash in the new fields in central FL and we are seeing FOB prices continue to fall after being high all winter. Quality is improving but scarring is still being seen due to past high winds.

WEST: FOB prices are down slightly again this week.

Quality is variable but good quality can be found. Crossings continue at Nogales. We expect volume to continue to increase over the next several weeks.

TOMATOES

EAST

Rounds

We are finally seeing some relief from the relatively high FOB tomato prices that we have been experiencing for most of this year. Weak demand and stronger supplies, especially from the west, have caused FOB prices in FL to drop materially on all sizes. We expect to see continued lower prices in the next few weeks as additional supplies from our new fields in central Florida start producing with some appreciable volume. This expectation of lower FOB prices over the next week or two assumes that demand remains weak. Quality is generally good.

Romas

Supplies in the east have increased slightly but continue to be tight and most repackers are sourcing MX tomatoes to meet demand. Even though supplies are tight, FOB prices are down due to light demand and a substantial increase in supplies from MX. Quality is good in the east. Quality continues to be variable out of MX but is improving.

Grapes

Weak demand and an increase in supplies both in the east and west has put substantial downward pressure on FL FOB prices. Quality remains variable but is improving quickly.

Cherries

FOB prices remain generally weak and have fallen again this week. Demand is weak. Quality is variable but improving.

WEST/MEXICO

Rounds

Vine-ripes continue to cross at McAllen and Nogales. Weak demand and stronger supplies have caused FOB prices to fall. We continue to see variability in quality and shelf-life but overall quality is improving.

Romas

FOB prices are generally down for the same reason they are down for rounds- decreased demand and an increase in supply. New fields in the east and in Baja will cause supplies to increase over the next several weeks. FOB prices are at or near Suspension Agreement minimums. We continue to see some quality issues in some lots due to puffiness and softness but overall quality has improved.



FRESH DIRECTIONS



Grapes

As forecasted last week, grape supplies have improved. Demand remains weak. This situation has caused FOB prices to drop dramatically from last week. Quality is improving.

Cherries

Demand is light. Supplies have improved. FOB prices are down from last week. Quality is variable but improving.

WATERMELON

Prices are inching down after months at high levels; Mexican stocks are finally increasing. Quality is very good: texture is firm and flavor is sweet. Sugar levels range from 11 to 13 Brix.