

# FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending April 22, 2016



| COMMODITY                                    | PRICE               | QUALITY      | PRICE TREND           |
|--|---------------------|--------------|-----------------------|
| Mexican Avocados                             | Moderate            | Good         | <b>VARIES BY SIZE</b> |
| 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 – <b>New Crop</b>    | Moderate            | Good         | ↔                     |
| Galas, Honeycrisp – <b>New Crop</b>          | High                | Good         | ↑                     |
| D'Anjous, Bosc Pears                         |                     |              |                       |
| Bartlett Pears                               | Moderate            | Good         | ↔                     |



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## MARKET OVERVIEW

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 in this region. We anticipate this market to be up and down until July. Green leaf, lettuce and green beans are plentiful!

### APPLES & PEARS

Washington storage prices are stable at low levels. Varietals like Braeburn, Honeycrisp, and Pink Lady are also readily available. Sugar levels average 11 to 14 Brix (sugar to acid ratio). Quality is excellent: texture is crunchy and flavor ranges from sweet to tangy. Pears: Remaining Washington storage supplies are dominated by 100- to 120-count sizes. Quality is excellent: flavor is subtly sweet with hints of citrus. Sugar levels average 12 Brix. California Bartlett's will hit the market in June.

### 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

The market is up. California rain decreased stocks; the Mexican season is ending. High prices are forecast through June. West Coast quality is very good: stalks are straight, tips are compact, and flavor is grassy.

### AVOCADOS

Prices are weak; supplies are abundant in both growing regions. Although demand will increase for the Cinco de Mayo holiday, stocks will be sufficient enough for all orders. Quality is very good.

### BANANAS

Supplies are much better. Quality is good.

### BERRIES

#### BLACKBERRIES

The market is level; supplies are adequate. Quality is good: sugar levels range from 12 to 13 Brix. New crop harvesting will begin in California in early to mid-May.

#### BLUEBERRIES

Expect high prices until at least May. Stocks are extremely limited in California and Florida; both seasons just started. Mexico will remain the primary source until domestic supplies become more plentiful. Overall quality is good: fruit is sweet, yet tangy.

#### RASPBERRIES

The market has inched up slightly. Mexican supplies are adequate. California stocks are limited, but will increase when the Salinas/ Watsonville season starts in a few weeks. Sugar levels range from 13 to 14 Brix.

#### STRAWBERRIES

California markets are poised to rise due to rain issues and strong Mother's Day demand. Quality is average. Weekend rain is causing quality problems such as bleeding, bruising, decay, light color, soft texture, and water damage. The Salinas/Watsonville season has begun; supplies will increase over the coming weeks.

#### BOK CHOY

Availability is good.

#### BROCCOLI

The market is stable; volume is high in Salinas and Santa Maria, California as well as Mexico (into South Texas). Quality is average: yellowing is a slight issue caused by heat.



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## BRUSSELS SPROUTS

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

## 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.

## CANTALOUPE

Market is steady with generally good supplies of 9's and 12's and lighter supplies of 15's on both coasts, the 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. Quality is very good. Sugar levels range from 12 to 13 Brix.

## CAULIFLOWER

The market is climbing, but should ease within 7 to 10 days. Cool nighttime temperatures, as well as the harvesting transition from the desert to Salinas, have tightened stocks.

## CORN

Supplies are limited for late-season corn (yellow, white) from California.

## CUCUMBERS

**EAST:** Our Florida growers are in full production and supplies are strong. FOB prices remain low. 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. 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 generally tight but a slight increase has put downward pressure on FOB prices. Quality of eggplant remains generally good.

**WEST:** Supplies have increased slightly and FOB prices are lower.

## FENNEL

Supplies for the week will be good.

## 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 imported 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 but will start to strengthen back up next week, 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 strengthen 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. The upcoming green market will stay very strong on the front end of the California and Mexican deals and then get leveled out around the end of May, but overall green volume looks lighter than normal for Mexico. Quality is good: green seedless sugar levels range from 17 to 18 Brix and red seedless run from 18 to 20 Brix.

## GREEN BEANS

Beans are in plentiful supply in Florida. New crop bean production in Coachella, in addition to the late season harvest in Mexico, will contribute to increasing availability and easier prices in the West.

## 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.





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## RED CABBAGE

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

## GREEN ONIONS

Plentiful supplies and quality is fair as we are seeing mildew or yellowing in some product.

## 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 dews will start around the second week of May followed by the Arizona desert dews. Quality is excellent: fruit is juicy. Sugar levels range from 10 to 11 Brix.

## 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. The market is strengthening up each week and will continue to do so as demand has been great and we will probably see the demand exceeds supply situation much earlier than last year. We will get through it but there will be some bumps in the road until we see the Chilean and Mexican productions hit the market place around mid-July/first of August.

## LETTUCE:

### GREEN LEAF/VARIETY LETTUCE

The market is slightly higher than last week. Growers have completed the harvesting transition to Salinas. Quality is very good, but the weekend's rain caused some mildew pressure.

## ICEBERG LETTUCE

The market is a bit higher and will continue to inch up next week when the move to Salinas is complete. Mildew pressure, rib blight, and tip burn are problems.

## ROMAINE

Prices are slightly higher than last week. Growers have completed the move to Salinas. Quality is very good, but recent rain is resulting in some discoloration and mildew pressure.

## ROMAINE HEARTS

Supplies are good and quality is good.

## LIMES

The market is high. Expect limited supplies through the Cinco de Mayo holiday. 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. We are seeing some relief and will continue to see improvement in the next few weeks.

## NAPA

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

## ONIONS

Most shippers have wrapped up the onion deal in Idaho/Oregon for the season and most will be back up and running on September 1, 2016. Most have moved all our onion production to Texas and will be there for another 2-3 weeks. Fobs are up a little this week coming out of Texas on the yellows. Looks like we have a two tier market right now between quality and something that struggles to make grade. The California, deal will start shipping on April 22nd. This crop looks very good with nice size and good volume.

## 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. The weather is calling for some normal temperatures for the next 7 days so picking should not be a problem, we are peaking on larger fruit which is keeping the smaller fruit a little tighter. 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.



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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. The upcoming Valencia crop looks very good and we should start out with some nice color as well as good sugar and juice content. 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.

## **GREEN BELL PEPPER**

**EAST:** Increase supplies from Florida and especially from MX is causing FL FOB prices to fall this week. We expect supplies from FL to continue to increase. Quality has been generally good.

**WEST:** Demand is soft. Supplies are plentiful from Nogales and from the desert. The desert product is bringing higher FOB prices due to its better quality.

## **JALAPEÑO PEPPER**

**EAST:** More supplies are putting downward pressure on FOB prices.

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

## **RED & YELLOW PEPPER**

Prices are steady. Production will start in early May. Mexican stocks are becoming more plentiful. Quality is very good, but high heat has caused some quality problems like dehydration and early breakdown.

## **PINEAPPLE**

Prices have inched down a bit, despite limited stocks. Quality is very good: fruit is firm, yet juicy with tropical notes. Sugar levels range from 13 to 16 Brix.

## **IDAHO POTATOES**

Norkotah pricing is mostly steady this week with few changes to report. We are seeing some strength this week in the 60 and 70ct Burbank markets. Idaho is also producing plenty of 2's, this is a market that could get a little sloppy over the next few weeks.

## **RADISHES**

Market is steady in CA. Great quality.

## **SALADS & BLENDS**

The market is unchanged. All production will be in Salinas by the end of this week. Quality is good, yet internal burn and mildew damage are occasional problems.

## **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, showing some mildew.

## **SPINACH (BABY)**

Baby Spinach and Clipped Spinach supplies are good.

## **SPRING MIX**

The market is steady; Salinas Valley stocks are adequate. Quality is very good: all varieties are being packed.

## **GREEN SQUASH**

**EAST:** FOB prices remain at low levels this week. Quantity generally good.

**WEST:** Crossings continue at Nogales. FOB prices remain at or close to floor levels. Quality remains generally good.

## **YELLOW SQUASH**

**EAST:** FOB prices remain at low levels. We are seeing disease pressures in the Plant City fields due to all of the rain those fields experienced in the earlier part of the growing season.

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

## **TOMATOES**

### **EAST**

### **Rounds**

Supplies continue to increase and demand continues to be light. This combination has caused FOB price to fall again this week. The yield out of the Palmetto/Ruskin growing region continues to increase and will continue to do so for the next ten or so days. Recent weather has been warm and sunny. The fruit on the vine is getting larger and we predict the prices for each size will converge in the next week or two. Quality is generally good and continues to improve.



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## **Romas**

Like the rounds, yields from our roma fields have improved and sizing is larger. FOB prices are down and quality is good and improving. Enough supply is now available in the east to the point that re-packers are not as depended on western romas to meet demand.

## **Grapes**

Weak demand and an increase in supplies both in the east and west has put substantial downward pressure on FL FOB prices again this week. Quality is generally good.

## **Cherries**

Supplies remain tight and demand has increased which has caused FOB prices to be stronger this week. Quality remains variable but is improving.

## **WEST/MEXICO**

### **Rounds**

Vine-ripes continue to cross at McAllen and Nogales. Sizing is much smaller and little large fruit is available. Therefore, FOB prices have increased for the larger sizes and remain at or near minimums for the smaller sizes. Few mature greens of any size remain available and no larger sizes are available. This sizing issue will probably

continue for the next four or so weeks. The next growing region to start will be Baja.

## **Romas**

Increased supplies from several growing regions coupled with light demand continues to keep FOB prices at or near Suspension Agreement minimums. Quality is improving.

## **Grapes**

Supplies continue to increase and demand remains weak. This situation has caused FOB prices continue to drop dramatically. Quality continues to improve.

## **Cherries**

Supply and demand continue in equilibrium and FOB prices are steady from last week. Quality remains variable but improving.

## **WATERMELON**

The market is stable. The domestic season will start in May, increasing overall volume. Quality is very good: texture is firm and flavor is sweet. Sugar levels range from 11 to 13 Brix.