

# FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending April 29, 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	Excellent	↔
Green Beans	Low to Moderate	Excellent	↓
Green Bell Peppers	Moderate	Good	↓
Red Bell Peppers	Moderate	Good	↑
Yellow Squash	Low to 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	Moderate	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 & Roma Tomatoes	Moderate	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> D'Anjous, Bosc Pears	High	Good	↑
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, green beans, and tomatoes are plentiful. Limes will be very tight until after Cinco De mayo. The National Weather Service predicts a 70% chance of rain in Salinas on Friday, April 22. The rain is expected to start late Thursday night and continue through Friday night. A total of "0.40 of rain is expected. Friday's harvest will certainly be impacted and there is the possibility of a rainout.

## 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). Quality is excellent: texture is crunchy and flavor ranges from sweet to tangy. The California season will begin in mid-July. The Washington Pear storage market is weak; stocks are dominated by 100- to 120-count sizes. Quality is excellent. Sugar levels average 12 Brix. California Bartletts 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 24s. Quality is excellent and most sizes are higher in price.

## ARUGULA

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

## ASPARAGUS

Mexico is pretty much done. Peru is picking up the volume; we should see more volume in another week. Quality out of Mexico is showing the characteristics of the end of season and Peru is improving very quickly on all sizes.

## AVOCADOS

The market is low, but may inch up slightly for the Cinco de Mayo holiday; stocks are plentiful enough to meet strong demand. Quality is very good: oil content is high, creating creamy texture and nutty flavor.

## BANANAS

Supplies are good. Quality is good.

## BERRIES: BLUEBERRIES

The market will be elevated for one to two more weeks. Stocks are starting to increase in California and Florida. Mexican supplies are adequate. Overall quality is good: fruit is plump and sweet, yet tangy.

## BLACKBERRIES

Prices are stable; Mexican supplies are sufficient. Quality is very good: sugar levels range from 12 to 13 Brix. The California season will begin in May.

## RASPBERRIES

Prices are stable despite strong demand. Mexican stocks are sufficient. California volume will increase when the Salinas/Watsonville season starts in early May. Sugar levels range from 13 to 14 Brix.

## STRAWBERRIES

Presently the strawberry market is seeing very high prices and short product. Oxnard had serious disease issues that depleted a lot of supply. With Mother's Day around the corner, we will be in a demand exceeds supply situation. The next three months will be rocky for berries. Salinas and Santa Maria do not have the volumes they expected. We will keep you up to date with this information weekly.

## BOK CHOY

Availability is good.



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## **BROCCOLI**

Although prices are steady, growers have been harvesting ahead of schedule for several weeks; stocks are expected to tighten. Strong demand is being met with sufficient production from Salinas and Santa Maria. Quality is good: bracketing is a minor problem.

## **BRUSSELS SPROUTS**

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

## **RED CABBAGE**

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

## **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.

## **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 expect this to last well into June. GA jumbos are now done for the year. Demand for conventional carrots is low right now, we are hoping this gives time for the jumbos to grow to full spec.

## **CAULIFLOWER**

Market is good; supplies are good. Quality is good.

## **CELERY**

Plentiful supplies, quality is fair to good. Supplies in Oxnard are decreasing and we expect to see this market get tighter.

## **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 continue to see downward

pressure. Quality is generally good.

**WEST:** Product continues to cross at Nogales at good levels. FOB prices remain at near floor levels. Baja has begun to harvest. We expect FOB prices to remain low through April.

## **ENGLISH CUCUMBER**

Steady availability in Nogales.

## **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 generally steady with downward pressure.

## **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**

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 strengthened in the past week as Chile experienced some rains that caused some issues and supplies will not be as heavy as expected through the end of the deal, which will probably end around the first week of May. The greens and reds have jumped substantially in price and will probably continue to climb until around the second week of May when we get descent supplies from Mexico and the Coachella valley. 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 start the California desert and Mexico by the first of May in a light way, 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 fair: green seedless sugar levels range from 17 to 18 Brix and red seedless run from 18 to 20 Brix.



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## **GREEN BEANS**

Green beans are in plentiful supply in Florida. The new crop harvest in the Coachella Valley of California will soon be in full swing; quality is excellent. The harvest in Mexico is winding down.

## **GREEN CABBAGE**

Green cabbage supplies remain average. We are seeing some quality issues such as seeders.

## **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**

Plentiful availability for new crop kiwi from Chile, however the small sizes (36's, 39's) will be very limited. The size profile will be heavy to 33's & larger.

## **LEMONS**

Market is very strong with good demand across the board creating a demand exceeding supply issue primarily on 140's and smaller 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 excellent. We are packing dist. 2 fruit now mainly size picking the larger fruit and leaving the smaller fruit on the tree to size up, which is causing the short supply on the 140's and smaller. 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 will strengthen up each week going forward and into the summer months. 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.

## **CALIFORNIA LETTUCE: GREEN AND RED LEAF**

Supplies on red and green leaf are plentiful and quality is good.

## **ICEBERG LETTUCE**

Demand is good, plentiful supplies.

## **ROMAINE**

Supplies are good and quality is good.

## **ROMAINE HEARTS**

Supplies are good and quality is good.

## **LIMES (PERSIAN)**

Prices are up. Stocks will be tight for another week or two. Growers in the main harvesting region of Veracruz, Mexico are in the lowest production period of the year. Quality is average: scarring is a slight problem.

## **MANGOS**

Supply is much better. We are seeing some relief and will continue to see improvement.

## **NAPA**

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

## **ONIONS**

Texas is in full production and by next Monday California will have plenty of product to sell as well. The sudden increase in the Texas market is partly due to weather and partly due to opportunity. When California begins bringing in some serious onion competition for Texas we could see this market level out. Any changes will be dictated by how fast CA comes to market. The Texas crop so far has been fair so far, we have seen some minor sprouting and some occasional decay but all and all most loads make good arrival. All reports out of CA have been very good, they are predicting excellent quality along with excellent sizing.

## **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 all of the non-gibed fruit off the tree in the next week. The weather is calling for some possible rain towards the end of the week and through the weekend, it does not look like we will have any major problems but we will keep you posted if things look like they will change.. The overall fruit quality is good to fair some blocks showing some clear rot and brown rot due to the previous rains and then warmer than normal temps which promote spore growth. The internal juice and sugar content is excellent, We will be going with navels through We will start some Valencia's the first of next week if any

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interest please let us know. 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 Mexico continue to cause FOB prices to fall on all sizes and grades. Quality has been good.

**WEST:** Demand is soft. Supplies are plentiful from Nogales and from the desert and FOB prices are down again this week. The desert product continues to bring 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 slightly again this week as supplies remain strong.

## **RED & YELLOW PEPPER**

Expect a rising market and tightening stocks for the next several weeks. The Mexican season is winding down and California production will not hit volume levels until mid-May. Quality is very good.

## **PINEAPPLE**

Volume is steady; the market has tightened up some from last week. Quality is very good: sugar levels range from 13 to 16 Brix.

## **POTATOES (IDAHO)**

Demand has exceeded supply on large size cartons this past week. Growers are now exclusively shipping Burbanks, and the size profile is heavier to smaller sizes. As a result, we are seeing stronger FOBs on larger sized cartons and we expect this trend to continue. No. 2 grade potatoes and small size consumer bag potatoes are in good supply and are currently exceeding demand.

## **RADISHES**

Market is steady in CA. Great quality.

## **SALADS & BLENDS**

Prices are steady. Production has moved to Salinas where it will remain until the fall. Quality is average: occasional internal burn and mildew damage are slight 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 level; Salinas Valley supplies are sufficient. Quality is very good, but hot weather and high winds are causing dehydration and wind damage.

## **GREEN SQUASH**

**EAST:** Like the yellow, FOB prices remain at low levels this week with continued downward pressure. Quantity is good.

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

## **YELLOW SQUASH**

**EAST:** FOB prices remain at low levels and we are seeing continued downward pressure. Supplies are plentiful and product is being harvested from Homestead, FL to south GA. Quality is variable due to disease pressures as a result of all the rain in past weeks.

**WEST:** FOB prices are generally steady at last week's low levels with continued downward pressures being exerted. Quality is generally good. Crossings continue at Nogales.

## **TOMATOES**

### **EAST**

### **Rounds**

Supplies continue to increase from the Ruskin/Palmetto growing region and will continue to do so for the next seven to ten days. For the first time in weeks, we are also seeing an increase in demand. Sizing continues to increase and the lack of the smaller sizes has put upward pressure on those FOB prices. FOB prices for 5x6s and 6x6s remain steady from last week. Quality is very good.

### **Romas**

Like the rounds, yields from our roma fields have improved and sizing is larger. FOB prices are down slightly again this week for all sizes. Quality is very good. As last week, there is now enough supplies in the east to the point that repackers are not as depended on western romas to meet demand.

### **Grapes**

Excellent supplies continue to put downward pressures on FOB prices. Quality is good.

### **Cherries**

Better supplies have caused FOB prices to fall from last week's levels. Quality is improving.



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## WEST/MEXICO

### Rounds

Vine-ripes continue to cross at McAllen and Nogales. Sizing continues to be smaller and little large fruit is available. Therefore, FOB prices for the larger sizes remain at a premium compared to the smaller sizes which remain at or near Suspension Agreement minimums. Few mature greens of any size remain available and no larger sizes are available. This sizing issue will probably continue for the next three weeks or so at which time the Baja growing regions will begin to produce with appreciable volume.

### Romas

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

### Grapes

Supplies continue to increase and demand remains weak. This situation has caused FOB prices continue to drop this week and are currently at or near minimums. Quality continues to improve.

### Cherries

Supply of quality cherries are tighter this week and the FOB prices of quality cherry tomatoes has increased. Many repackers are having to go east to meet the demand for quality cherries.

## WATERMELONS

Nogales and McAllen both have good supplies of Mexican fruit. Market is weaker with domestic fruit about a week away. Texas and Florida watermelon will add to an already steady supply chain. Figure pricing to remain steady until chains really begin promoting. Sugar levels range from 11 to 13 Brix.