

FRESH DIRECTIONS

Weekly Produce Trend Report for Week Ending May 6, 2016



COMMODITY	PRICE	QUALITY	PRICE TREND
Mexican Avocados	Moderate	Good	VARIES BY SIZE
Blackberries, Raspberries	Moderate	Good	↔
Blueberries	Extreme	Good	↔
Strawberries	Extreme	Fair	↔
Grapefruit, Lemons	Moderate	Good	↔
Limes	High	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	Excellent	↔
Green Beans	Low to Moderate	Excellent	↔
Green Bell Peppers	Moderate	Good	↓
Red Bell Peppers	Low	Good	↑
Yellow Squash, Zucchini	Low	Good	↔
Green & Red Seedless Grapes	Very High	Good	↔
Fennel/Anise	Moderate	Very Good	↔
Bok Choy, Frisee, Mache	Moderate	Good	↔
Cantaloupes	Moderate	Good	↔
Honeydews	High	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 – New Crop	Moderate	Good	↔
Galas, Honeycrisp – New Crop	High	Good	↑
D'Anjous, Bosc Pears			
Bartlett Pears	Moderate	Good	↔



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MARKET OVERVIEW

Rainfall occurred in the Salinas Valley late last week, followed by breezy afternoon conditions, with wind gusts to 40 mph on numerous days. The result has been varying degrees of fringe burn and mildew now appearing on iceberg, romaine and leaf. Blueberries and strawberries are showing quality issues and high prices. Garlic is also in short supply. Jumbo carrots and plugs 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. Limes will be very tight until after Cinco de Mayo.

APPLES & PEARS

Washington storage prices are expected to remain low for several weeks. Varietals like Braeburn, Honeycrisp, and Pink Lady are also on the market. Sugar levels average 11 to 14 Brix (sugar to acid ratio). Quality is excellent: texture is crunchy and flavor ranges from sweet to tangy. Harvesting will start in California by mid-July. Washington Pear prices are low; remaining storage supplies are dominated by 80- and 90-count sizes. Quality is excellent. Sugar levels average 12 Brix. California Bartletts will enter the market in late 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 light. Quality is fair.

ASPARAGUS

The market is elevated. Although California will be the main source from April to June, rain and cool weather are slowing growth. West Coast quality is very good: stalks are straight, tips are compact, and flavor is grassy.

AVOCADOS

Prices are slightly higher than last week despite abundant stocks; demand is strong for the Cinco de Mayo holiday. Quality is very good: oil content is high, creating creamy texture and nutty flavor.

BANANAS

Supplies are good. Quality is good.

BERRIES: BLACKBERRIES

The market is level; Mexican volume is average. Quality is very good: sugar levels range from 12 to 13 Brix. The California season is slated to start in a week or two.

BLUEBERRIES

Prices have begun easing. Supplies are increasing in California and Florida. Mexican stocks remain sufficient. Overall quality is good: fruit is plump and sweet, yet tangy.

RASPBERRIES

The market is unchanged. Mexican volume is higher than that in California. Expect Salinas/ Watsonville supplies to increase over the next several weeks. Sugar levels range from 13 to 14 Brix.

STRAWBERRIES

Strong demand is keeping prices elevated; supplies are limited. Quality issues such as bleeding, bruising, soft texture, water damage, and white shoulders are concerns following recent rain. More storms are in this week's forecast. Expect tight stocks through Mother's Day.

BOK CHOY

Availability is good.

BROCCOLI

The market is starting to climb; demand is strong. Stocks harvested in Salinas and Santa Maria, California are plentiful, but Mexican volume has fallen. Quality is good, but branchiness is a minor issue.

BRUSSELS SPROUTS

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



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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 into the first week of May. We are expecting to start Cantaloupe in the California desert around May 2nd in a light way and by the second week of May should be in much better production out of the California and Arizona deserts. The overall desert crop looks very nice as weather has been ideal. Quality is very good. Sugar levels range from 12 to 13 Brix.

CARROTS

EXTREME MARKET ON JUMBO, PLUGS and STICKS CONTINUES IN THE CA GROWING REGION. Availability is below average for jumbos and plugs 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

Prices are starting to climb; stocks are tight. Quality is excellent: color is snowy white and flavor is earthy.

CELERY

The market is stable; volume is high. Quality is very good, although pith and seeders are minor issues.

CORN

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

CUCUMBERS

EAST: Our Florida growers continue in full production and supplies are strong. FOB prices for supers continue to see downward pressure. Selects are generally steady with only slight downward pressure. Quality is 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: A few more supplies are coming online which is causing FOB prices to drop. Quality of eggplant remains good.

WEST: Supplies have increased and FOB prices have responded downward. Quality is variable.

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 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 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 all the greens that remain here are storage quality. 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. The red seedless market out of the desert and Mexico will start next week but volume by May 9th and then prices should level off. Green seedless sugar levels range from 17 to 18 Brix and red seedless run from 18 to 20 Brix.

GREEN BEANS

Green beans are in oversupply in Florida. The new crop harvest in the Coachella Valley of California is in full swing; prices are firm.

GREEN CABBAGE

Green cabbage supplies remain average. 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.

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GREEN ONIONS

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

HONEYDEW

Market has strengthened a bit as supplies have been lighter from offshore and Mexico, 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. We will start California desert dewes around May 9th and also the Mexican production should start to increase around that time frame as well and the market should start to ease at that time. Quality is very good: 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.

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 LEAF/VARIETY LETTUCE

The market is starting to climb; cool weather and rain have slowed growth in Salinas. Quality is very good, but fringe burn and mildew are slight problems.

ICEBERG LETTUCE

The market is up; low temperatures and rain have decreased supplies. Quality is very good, but growers must peel outer leaves due to problems with cracking, dense heads, and insect pressure.

ROMAINE

Prices are going up due to cooler temperatures and strong winds. Overall quality is very good, although discoloration, mildew, premature pinking, tip burn, and wind damage are slight problems.

ROMAINE HEARTS

Supplies are good and quality is good.

LIMES

The market is elevated; supplies are expected to remain limited until mid-May. Growers in the main harvesting area of Veracruz, Mexico are in the lowest production period of the year. Quality is good: scarring is a minor issue.

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

Increased supply in California and Texas on yellow onions is now exceeding demand. We are starting to see pricing come off in both areas. We expect this trend to continue for the next couple weeks. Red onions have remained firm, however, California is expected to have an increase in supply next week, and we should see relief on pricing there as well. White onions are still in short supply and FOBs remain strong.

ORANGES

Market is steady to firming up with good demand of all sizes and some late variety navels demand higher prices. 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 May and possibly longer depending on weather and fruit strength. We have started some Valencia's and the fruit looks good and has good sugar and juice content, if any interest please let us know. The upcoming Valencia crop looks very good and supplies should be a bit better than last year as our crop is estimated to be about 15% larger than last year. Quality is 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.



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GREEN BELL PEPPER

EAST: Increase supplies from Florida and Mexico continue to cause FOB prices to fall on all sizes and grades. Quality is very 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: FOB prices are generally steady. Quality is good.

WEST: FOB prices are down again this week as supplies remain strong.

RED & YELLOW PEPPER

Prices will remain high and supplies will be limited until the Coachella, California season hits volume levels in a few weeks. The Mexican season is winding down. Quality is very good.

PINEAPPLE

The market is stable. Although adequate, stocks are tighter than normal for this time of year. 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. Quality is average due to the rain.

SALADS & BLENDS

The market is level; supplies are ample. Quality is good: internal burn and mildew damage are occasional issues.

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. Market is very tight.

SPINACH (BABY)

Baby Spinach and Clipped Spinach supplies are very tight. Quality is fair.

SPRING MIX

Prices are stable; Salinas Valley stocks are adequate. Quality is average: dehydration, insect pressure, oversized leaves, and wind damage are minor problems.

GREEN SQUASH

EAST: Like the yellow, FOB prices remain at low levels this week. Quantity is good.

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

YELLOW SQUASH

EAST: FOB prices remain at low levels. Supplies are plentiful and product is being harvested from Homestead, FL to south GA. Quality is variable but good quality can be found.

WEST: FOB prices are seeing downward pressure. Quality is generally good. Crossings continue at Nogales.

TOMATOES

EAST

Rounds

Nearly perfect tomato growing weather since Valentine's Day has created a bumper central Florida crop in terms of both quality and quantity. Demand is still relatively weak but is showing signs of improving. Supply will easily be able to keep pace. In fact, we see strong supplies for at least the next 20 or more days. FOB prices have fallen to near floor levels and are the same for all sizes. Some western re-packers are now pulling from Florida. In the next week or two, we may see the large sized tomatoes be more plentiful than the smaller sized fruit which would lead to an inverted market where the smaller fruit becomes more expensive than the larger fruit. Quality is excellent.

Romas

Like the rounds, yields from our roma fields have improved. FOB prices are down again this week for all sizes. Quality is excellent.

Grapes

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

Cherries

Supplies continue to increase and FOB prices have fallen again to near floor levels. Quality is very good.

WEST/MEXICO

Rounds

Not as much has changed in the west as it has in the east. Vine-ripes continue to cross at McAllen and Nogales and continue to start up in Baja. Sizing continues to



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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. We will see changes next week as mature greens will begin to be harvested for the first time in over a month.

Romas

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

Grapes

Good supplies out of Nogales and Baja are keeping the FOB prices of grapes at low levels. The quantity and quality of the fruit crossing at Nogales is not as good as that crossing from Baja.

Cherries

FOB prices at Nogales are at or near Suspension Agreement minimums but the quality is only fair. Cherries crossing at Baja are bringing higher FOB prices but has much better quantity.

WATERMELON

Prices are steady. Domestic harvesting will start in mid-May, increasing overall volume. Supplies from Guatemala and Mexico are sufficient. Quality is very good, but hollow heart is a minor problem. Sugar levels range from 11 to 13 Brix.