



Market Report

Volume 9 - Week 10

March 7 - March 13, 2010



Chilean Fruit

The markets are in turmoil as growers and transporters sort out the extent of earthquake damage. Many piers are working at 60-90% capacity and are loading some vessels. Fruit is being shipped or redirected to piers that are capable of taking the fruit; however, trucks that are connecting through alternate routes have caused some delays. Since some fruit was already enroute and due to arrive this week, supplies will slowly begin to decrease and prices increase—especially on grapes. The grape market was strong already and the spot market continues to rise.



California Citrus

California's navel market is strong with little or no flexibility in price. There is good availability on all sizes of navels with the best prices on larger fruit. Lemons remain steady overall.

Florida Citrus

The market on juice oranges will strengthen as most growers are packing Valencia oranges now. The grapefruit market has been steady, but the mid sizes (36 and 40 count) could gain a little strength due to heavy bagged citrus ads this week. Honey tangerine supplies are good and this market is expected to remain flat.

Apples

The Washington State apple markets are steady, but could easily increase regarding Granny Smith, Gala, Fuji and Golden Delicious apples. Supplies on many varieties are sporadic depending when growers are packing.

Pears

Anjou and Bosc pear markets are a bit stronger this week since spot deals continue to dry up. Bartlett pears are arriving from Argentina and Chile, with Chilean pears available for a cheaper price. Argentina's pear crop is smaller, so expect the prices on Chilean product to increase soon.

Strawberries

Rain in California and cold temperatures in Florida continue to hamper production. California's occasional rains has not allowed growers to schedule regular production and Florida's need to ice over berries in order to combat frost makes availability sporadic. Prices remain steady and major price fluctuations are not anticipated this week. Expect to find some rain damaged fruit and white shoulders as growers continue to pick ahead to stay in front of the weather.

Bush Berries

Supplies of raspberries are improving and should be better by mid-March. Raspberries continue to be produced out of Mexico and California. Blackberry promotional opportunities will not be available until the last week in March. Chilean blueberries were already decreasing in volume; however, the earthquake impact will lessen these supplies even more causing the markets to spike. Expect light production to start in California.

Melons

Cantaloupes are peaking on the 9 count and larger sizes. Supplies are limited with a lot of demand so expect prices to remain high on cantaloupes. Honeydews are peaking on the 6 count size with little or no smaller sizes. Expect honeydew prices to remain strong, but steady. Watermelons arriving from Mexico are excellent! This market will improve slightly as additional volume crosses into Texas during the next 2 weeks. The higher than usual costs of watermelons should be short lived.



Tomatoes

Mexico continues to be the major player on tomatoes. Look for beautiful 3x4's and 4x4's as sizing continues to lean to the large side. Pricing should remain steady as supplies from Florida are extremely limited. Mexican roma tomatoes remain steady with very good supplies and superb quality. Grape and cherry tomatoes continue to be very tight. Expect pricing to remain much higher than usual with more limited volumes; however, quality is excellent.

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Yellow Squash and Zucchini

Florida growers are reporting slow growth due to weather conditions. Imports from Mexico continue to supply the majority of the buyers. Quality is generally good on zucchini and improving on yellow squash. The markets are weakening on yellow squash, but steady for zucchini. Expect Homestead and other South Florida fields to start producing more volume very soon.

Eggplant

Eggplant availability is becoming more scarce due to cool weather. Mexican imports are tighter than usual in supply. Sizing is smaller; with more 24's available than 18's. Growers do not expect any relief in the short term since April would be the first for any domestic production. Look for prices to continue to climb.

Corn

Unfortunately, corn is still nonexistent from Florida and the spring crop outlook is not good either. Continued cold weather makes harvest estimations difficult to determine. Expect shortages followed by gluts and the trend to then continue.

Asparagus

Very good supplies of asparagus are still available and demand remains weak. Many growers in Mexico are experiencing a peak in production, which will be followed by steady volume. Mexican grown asparagus will be available through March. Growers anticipate light volume from Lodi or Stockton within the week. Expect a slight increase in price due to the Easter holiday.

Cauliflower and Broccoli

Cauliflower production continues to be light this week, which will keep the markets climbing. Cauliflower has an off white to cream color and some reports of decay in the jacket leaves because of rains. Quality should improve since Salinas Valley will start harvest soon. There is a limited supply of cauliflower from Florida. The broccoli market is stronger due to light supplies and quality issues. Yuma is facing a gap challenge, plus excessive rains have caused quality issues in Santa Maria and Salinas. Currently, demand exceeds supplies of broccoli. Crown prices are even higher due to most broccoli being too branchy for crown usage.

Green Beans

Supplies of green beans are very limited. FOB's have soared causing the overall price to the shelf to be very high. New fields are currently blooming in Florida and any warm weather would allow for harvest in 10-14 days; however, expect scarce supplies for Easter.

Green Bell Peppers

Florida supplies of green bell peppers will remain tight for the next 4-6 weeks. Palm Beach County fields remain the only production in the state and newly replanted fields are growing very slowly. Quality is weak at this time and sizing is smaller than normal as growers strip fields in order to fill orders. Shippers do expect a slight increase in volume by mid-to-late March. Expect relief by mid-April when statewide acreage will be ready for harvest. Continuous weather issues in Mexico's growing regions have decreased their production. Prices are up due to overall high demand and limited availability. April and May marks the end of the season for most growers in Mexico, so volume overall is beginning to decrease. Expect market prices to remain at the today's high levels.

Celery

There has been a slight increase in demand for celery last week, which has the market on the rise. There are decent supplies of good quality celery in the Oxnard and Yuma growing regions. This market should remain steady or possibly become slightly stronger this week. Florida is shipping now and is a more cost effective alternative for the larger naked pack.

Iceberg Lettuce

Yuma's transition has made finding good quality iceberg lettuce at this time a challenge. Markets have increased as supplies are softer and salad processors are buying acres to satisfy their needs. Most product has good color and size, but there remains the issue of misshapen and wild looking heads. The occasional cracked mid rib and mechanical issues are apparent as well. Huron is scheduled to start the week of March 22nd and then transition to Salinas the week of April 6th.

Leaf Lettuce

The flush in leaf lettuce from earlier this month has now caused major gaps in supply. Overall, demand is weak so the market increases have been gradual. However, any spike in demand will cause the market to react immediately.

Cucumbers

Cucumbers will remain an imported item for the remainder of the month from either Honduras or Mexico. Offshore shippers are currently planning to extend their season as far into April as possible to compensate for the lack of product in Florida. Cold, windy weather in Florida has made the cucumber vine remain stagnant; therefore, expect to see volume from Florida by mid-to-late April at the earliest. When Florida begins their harvest, expect a higher percentage of Selects because of the adverse weather. Mexico's harvest will wrap up by April/May. Expect the market to remain at its current high levels.



Organic Market Report



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Organic Apples

The Washington Braeburn apple market remains firm due to dwindling supplies. Cameo apples will end this week. Fuji and Red Delicious apples supplies are limited through May. Gala and Pink Lady apples will be available in limited supply through April. Argentinean fruit should begin in the next few weeks. Gold Delicious and Granny Smith apples are expected to climb quickly during the next few weeks as the season ends. Imported apples should arrive shortly after the season. Local York apples will continue for another few weeks with superb quality.

Organic Citrus

Texas grapefruit has ended as will Florida's supplies in the next few weeks. California has ample supplies with outstanding quality. Meyer and standard lemons are steady in a low market with excellent quality. California's blood oranges will be in steady supply this week with promotional opportunities available. Italian blood oranges should arrive late in the week with fantastic taste and quality. The navel market is rising as this season winds down. Florida Valencia oranges and California pummelos are in ample supply with promotional opportunities available!

Organic Berries

Chilean blueberries will be in steady supply for the next 1 to 2 weeks; however, at that point we will begin to see limited supplies due to the earthquake. Mexican blackberries are limited, so expect the strong market to continue. Raspberries and strawberries from California and Mexico are available in steady supply this week.

Organic Pears

Argentina is in full swing with great supplies of green and red Barlett pears during the next few weeks. New Packham and Anjou pears are expected shortly. Expect excellent quality and a steady market.

Organic Grapes

Supplies of green grapes from South Africa will increase slightly as the last of this fruit arrives by mid-week.

Organic Broccoli

As expected, broccoli and broccoli crowns have tightened up. Growth in the fields has slowed production of adequately sized stalks. Some shippers will begin harvesting again early this week. Expect this market to be higher during the next 2 to 3 weeks before any relief is in sight.

Organic Cucumbers

Demand increased as supplies from Mexico dwindled. Florida may have a few by the end of the week, but that small amount will not affect the market. Overall quality is still outstanding.

Organic Tomatoes

Round and grape tomato supplies remain very limited and expensive. Quality is good; however, some grape tomato shippers have softer product than others. Expect tightness and high prices to remain through the end of the month.

Organic Lettuce

Organic lettuce supplies from Florida and California are abundant with exceptional quality. Red leaf, green leaf, and romaine are all promotable. Adequate supplies of butter and red butter lettuce are available from California.



Organic Asparagus

The asparagus market has tightened up slightly due to the transition to the North for supplies. This area has recently been impacted by rain.

Organic Zucchini

Even more limited supplies from Mexico are expected; however, shipments from Florida will begin this week with limited supplies.