



FRESH DIRECTIONS

WEST CREEK FRESH

An informative weekly produce trend report.

January 2014

APPLES ↔

New York packers continue running Empires, Macs', Romes, Red Delicious, Galas, Fuji's, Macouns, and Courtland's. The New York varieties are still peaking between 88's and 100's mostly. The New York market is steady. Michigan continues to pack Red Delicious, Fuji's, Golden Delicious, Gala's, McIntosh, Jonagolds, Jonathans, and Red Romes but the varietal numbers are low. Michigan C.A. fruit is a little larger now as they are peaking on 113/125's. Michigan supplies are limited and they are still scrambling to recover from the cold that hit last week. Washington Red Delicious are mostly steady on the smaller sizes with some lower on the larger and they are still peaking on 88's and larger in the Washington extra-fancy #1 grade. Smaller red supplies remain limited. Golden Delicious is also steady and is still peaking on 80/88's in the Washington extra-fancy grade. Granny-Smith is also steady but some shippers will deal on various sizes. The Granny's are peaking on 88/100's in the extra-fancy grades. Galas are steady and peaking on 88/100's. Washington Fuji's are steady to higher and most packers are still peaking on 80's and larger. Most shippers are into C.A. Fuji's now. Honeycrisp, Braeburns, Pink Ladies, Cameos, and Jonagolds, and the other varietals are all still available. Most of the varietal fruit is large but some varieties have smaller sizes.

ASPARAGUS ↓

This market continues to get softer as supplies out of Mexico get stronger. Product coming from Peru continues to be on the light side. Loading out of Miami is still an option if desired. Jumbo asparagus still is difficult to come by. The predominance of the crop continues to be on sizes ranging from standard to extra large.

AVOCADO ↑

Demand is good on all sizes. Mexico's supplies are tight as growers are pushing for higher field prices. Market has firmed on all sizes to reflect to tightening of supplies.

BELL PEPPERS

Western Bells: ↑ Green bell market is heading higher as some growers have experienced a few weather issues. Crops are currently shipping mostly from Nogales. Sizing is now getting heavier towards large fruit as some are breaking into new lots. Market is becoming active in the choice and small bells as some lots in Nogales are not up to snuff or very light in the smaller off grade sizes. Cooler evenings are affecting production. The added demand from the east is pressing the market up. Nogales will see increased crossings in the next coming weeks. We anticipate some warmer weather but, evenings are still on the lower side than average. Open field colored Red bell market is higher as fields are not coloring up as a result of cool evenings. Mexico has started with increasing crossings through Nogales but added eastern demand is pressuring the market. Markets are very unsettled as both Hot House and open field color bells are trying to find their spot. Quality is good in both open field and hothouse colored bells. Gold bells markets continue steady availability depends on growing district. Demand exceeds as Mexican production has started in earnest. We are starting to see some hot house product crossing but still light.

Eastern Bells: ↑ There appears to be no relief in sight for the pepper market. Recent temperatures that have dipped below freezing several times in the last week have caused this market to spike along with a considerable decline in volume. Freezing temperatures are forecasted again for this week, so we can assume this market will continue to trend upward and orders will be prorated.

BERRIES

Strawberries: ↔ Strawberry supplies are coming out of California; Florida and Mexico. Central Mexico and Florida production is forecast to peak earlier/mid February with Oxnard volumes ramping up into the spring. California still has the best quality and availability, but cannot cover all commitments loading out of the west coast. California and Mexico is expecting normal temps this week while Florida is having very small



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chance of rain/colder temps on Monday/Tuesday then warming up thru week. Florida availability will remain extremely low this week due the inconsistent weather patterns. Most shippers will be cleaning up their fields in this area this week. This market will remain steady but firm as demand improves over the weeks leading up to Valentine's Day.

Raspberries: ↑ Good demand and light supplies are keeping this market firm. This is the lowest production period of the year for Raspberries. Most shippers are sold out thru the weeks and will only be covering contacts. Supplies will not increase for about another month. Quality is being reported as good.

Blackberries: ↑ Lighter supplies and better demand is causing a stronger market. Central Mexico supplies were tight this week due the rain and hail storms couple weeks ago. Expect to see overripe berries due to the cold temps the past couple weeks. Currently, Mexico Central is forecasting better weather which will help supplies and quality. This market will remain tight until end of this week. Quality is fair at best.

Blueberries: ↑ This market will remain slightly firm depending upon availability with each shipper. Supplies coming from Chile will be inspected as they come into the U.S. due to the European Grape Vine Moth being found in a few of the growing areas. Expect delays with the product being release once it arrives at the U.S. ports, which will hold up transfer trucks. By the end of the month, normal promotable volumes for February will be arriving by containers. Quality is being reported as good.

BROCCOLI ↔

The broccoli supplies are moderate. This market has started out steady with most suppliers. Production continues to be in Santa Maria, Salinas, Scottsdale and Yuma. The quality has been reported as good in all the growing regions. Bunched product is lighter in availability compared to crowns.

CARROTS ↔

Supplies of carrots are good, with good size on JBO's. Quality is good.

CAULIFLOWER ↓

The cauliflower market is softer to start the week. Demand is light, overall. The quality has been good as weather has been ideal for growing conditions. With no rain in the forecast, supplies are expected to be good

throughout the week. Expect this market to be active into next week.

CELERY ↔

The celery market is steady. Production continues out of Yuma, Oxnard and Santa Maria. Supplies are expected to be good throughout the week although sizing is trending to the larger celery. The quality is reported to be good. Shippers are listening to offers, especially on larger sizing, 24s in particular. This market is likely to stay steady throughout the week.

CITRUS

Lemons: ↔ The freeze in the Central Valley has now started to affect this districts lemon crop. This is not a larger crop, but will have an impact on overall supplies as we move in to the late winter through summer months. We already see the market beginning to firm up. Demand still remains very good on all sizes from all shippers. The Desert fruit supplies are good on 140's and larger. Smaller fruit 165's/200's/235's are just meeting daily demand.

Oranges: ↑ California Freeze may be over, but damage has been done. Growers are reporting at least 40 to 50% or higher for some. Supplies on the smaller sizes of 113's & 138's are very limited and now moving into 88's. Market has firmed up.

Limes: ↑ Supplies have tightened up with rains in the growing areas. Quality is just fair, with many lots showing weather related issues (Stylar, Brown spots and lighter color).

CUCUMBERS

Western Cucumber: ↑ Market is definitely higher as slower production and gaps are pressuring market upwards. Crossings through Nogales are steady but with cooler evening's production is on the slow side with added demand from the East is pressuring markets upwards. We anticipate the weather and evening temps will improve this week and counting on production to increase accordingly. Quality is good.

Eastern Cucumbers: ↑ There are little to no domestic cukes remaining in Florida so the domestic market is not a factor. However, supplies on off shore product remain limited. With Honduras still moving from old fields earlier than usual to newer fields that are not quite ready, this situation doesn't look like it will improve this week. Expect high prices and limited volume.



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EGGPLANT

Western Eggplant: ↔ Market is settling and supplies are improving. Weather is cooler than normal in the evenings and is affecting production. We anticipate weather improving the next week. Availability is keeping up with demand. This is keeping markets steady.

Eastern Eggplant: ↑ The eggplant market remains at the higher levels. Florida's freezing temperatures have had somewhat of an impact on domestic supplies. But with Honduran product available, there should be adequate volume and the market should remain at current levels for the remainder of the week.

GRAPES ↑

California Crimson is finished for the season. Chilean red and green new crop fruit is now available on both coasts. The quality is very good and the market is in the high 20's low 30's depending on size on both colors. Due to the freeze a couple months ago the fruit will be very small with minimal large fruit available. We will see more shippers over the next few weeks with fruit available on the west coast. Currently the shipper pool is limited.

GREEN ONIONS ↔

This commodity continues on a steady path with most suppliers. The weather has been warm in Mexico and supplies are expected to be good throughout the week. Mexico and California are the major growing regions currently.

LEAF LETTUCE ↔

The romaine market is steady. Lack of demand has made this market flat. Suppliers are listening to offers. Weights continue to range from 34-37 pounds in Yuma, Thermal and Santa Maria. The green and red leaf is averaging 20-24 pounds and availability is also good. Pricing is steady. Blister and epidermal peel has been seen, but minimally. Overall quality has been good.

LETTUCE ↔

This market continues for yet another week to be flat. Demand is off. The weights are ranging from 40-46 pounds depending on the supplier. Yuma production is expected to be strong throughout the week. Epidermal peel, cracking, misshapen heads and ribbing appearance have been seen sporadically upon arrivals. Again, shippers are listening to offers with good volume numbers, so don't be afraid to promote this commodity.

MELONS

Cantaloupe: ↑ Guatemala highlands are where the fruit is now being grown. With strong winds, and growing conditions not as good as the lowlands, there are lower yields. Cantaloupe will be more limited over the next few weeks. Demand is a little better so the market is up.

Honeydew: ↑ Mexican fruit is available but very limited with only a few shippers currently harvesting. The market is very strong and continuing to rise. Import fruit is extremely limited on the west coast with little to no open market fruit available. The east coast is limited on fruit as well. The next few weeks will continue with very limited availability.

ONIONS ↑

Yellow onions are steady to higher on jumbos and larger in all areas. This is due to slightly stronger demand, lower storage supplies, and lower pack-outs. Some areas storage supplies are down 25% from last year so the growers are bullish. Reds are steady to higher in all areas as well. Red supplies are steady to lower depending on the supplier. White onions are steady on all sizes even though some packers have lower inventories. The quality has been good in all areas and on all colors.

POTATOES ↔

Idaho is steady on both varieties but the carton availability is improving especially in Burbanks as more shippers are packing them. Both varieties are more evenly sized now and the quality has been good on both. Washington is also steady on all sizes. Colorado & Nebraska are both steady and they continue to peak on 70's and larger. Wisconsin russets are also steady on all sizes and the availability is better now. Bakersfield, California is packing its own Reds, Golds and Whites now. The California market is steady on Reds and steady on Golds and Whites. Western Washington reds and Golds are both peaking on A-size and the markets for both are steady. Wisconsin red potatoes are mostly steady on all sizes now. N.D. red potatoes are steady and continue to peak on Red A's but they have good availability on B-size as well.



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SQUASH

Western Squash: ↔ Market is higher on Yellow S/N but Italian squash is coming off slightly, cooler evenings and transitions are slowing production. Added demand from East coast is pressuring this market up as well. Most production is from southern Sonora and Sinaloa. The cooler evenings are slowing down some harvesting. We anticipate a few evenings of cold weather in the state of Sonora; we anticipate the slowing in production for some growing areas until evenings start warming up. We expect this week for most growing areas to warm up.

Eastern Squash: ↑ Recent cold temperatures, high winds and heavy rains have kept this market tight. Despite the full moon, south Florida's temperatures have dropped below freezing for the past few nights, creating a very active market. Expect prices to remain high throughout the week.

STONE FRUIT ↔

Chilean cherries are available on both coasts mostly large fruit coming in. Chilean Peaches and Nectarines are now available as well. The sugars are low in this fruit but quality is good.

TOMATOES

Western: ↑ Supply in Mexico continues to improve helping with the gap occurring in the East. With demand up for both eastern and western growers, rounds have increased this week. Romas are steady this week with the possibility of demand increasing through next week if Florida remains tight. Similarly, grape and cherry tomatoes are being supplied to the nation while Florida struggles to cover the East. Mexico production is expected to be in full swing by early February with supplies over all increasing over the next couple of weeks. However, with nationwide demand also shifting to the west it may be a few weeks until prices begin to come down again.

Eastern: ↑ There is a small supply gap from Florida this week as weather continues to pose challenges for growers. The round market continues to strengthen as yields struggle to meet steady demand with large fruit harder to come by. Cool weather is slowing the maturity of fruit cause picks to be smaller in size making larger sizes harder to come by. Roma supplies are also tight facing the same weather tribulations increasing the price for all sizes. Grape and Cherry tomato prices are also up this week by dollars while yields are low sending buyers to the west to meet demand. With yields down and more cool weather expected this week we can expect the market to remain firm possibly increasing next week as buyers gear up for the Super Bowl.

WATERMELON ↑

Market is definitely higher. Crops are sizing down as early crops are wrapping up. Current Nogales crossings are slowing down. Transitions are taking place and supplies are sporadic and very light. New district crops will be at a premium. Quality is good but volume is light. Other districts have wrapped up. The Jalisco watermelons will be at premium.