

# FRESH DIRECTIONS

WEST CREEK FRESH

WEEKLY PRODUCE TREND REPORT

For Week Ending February 21, 2014

## MARKET OVERVIEW

Quality continues to be strong for many mixed vegetable items. Persistent cold and snow throughout much of the country has caused a slowdown in demand for most items, with the market for row crop vegetables particularly depressed (broccoli, iceberg, romaine, leaf). On the supply side, row crop vegetable shippers are hoping for an improvement in the current oversupply situation for lettuce items, as growers are ahead of harvest schedules. We have begun to see modest advances in price. Availability is good for most sizes/grades of all citrus items this week.

COMMODITY	PRICE	QUALITY
Avocados	Moderate	Good
Raspberries	Moderate	Very Good
Blackberries	Low	Very Good
Blueberries	High	Good
Strawberries	Low	Good
Grapefruit	Moderate	Excellent
Lemons, Oranges, Navels	High	Good
Limes	Extreme	Good
Pineapples	Moderate	Good
Green & Red Leaf, Iceberg Lettuce	Low	Good
Romaine, Romaine Hearts	Low	Fair
Green Beans	High	Good
Yellow Squash, Green & Red Bell Peppers, Zucchini	Moderate	Good
Cucumbers	Low	Good
Grapes – Green Seedless	Extreme	Excellent
Red Seedless, Cantaloupes, Honeydews	High	Excellent
Cilantro, Green and Red Cabbage	Moderate	Excellent
Bok Choy, Peeled Garlic, Napa	High	Good
Artichokes, Arugula, Asparagus, Carrots, Cauliflower, Frisee, Fennel/Anise, Kale, Mache, Parsley, (Curly & Italian), Snow and Sugar Snap Peas, Baby Spinach, Spring Mix	Moderate	Good
Broccoli, Celery, Green Onions, Spinach (bunched)	Low	Excellent
Red Onions	Moderate	Good
Yellow and White Onions	High	Good
Potatoes	Moderate	Good
Round, Roma, Plum Tomatoes	Moderate	Good
Cherry, Grape Tomatoes	Moderate	Good
Red and Golden Delicious	Moderate	Good
Galas, Granny Smiths, Fujis, D'Anjous, Bosc Pears, Red Anjous	High	Good
C/A Bartlett Pears	Moderate	Fair
Honeycrisps	Extreme	Good



# FRESH DIRECTIONS



## ARTICHOKES

Good supplies of 18's and 24's, fair supplies on 12's and 30's. Light supplies of 36's. The more moderate temps will help to improve quality, and the precipitation should help to stimulate the plants. Volume is still quite low. Demand has improved and the market seems to be advancing.

## ASPARAGUS

Production is now in full swing in Mexico. Prices remain at favorable levels.

## AVOCADOS

Inventory levels have been very high the past two weeks and continue to adjust. Volume from Mexico last week was down significantly and will be relatively low this week as well. While movement was generally good for the Super Bowl for most chain stores, there were some importers who had high inventories with fruit that had to be discounted. The situation appears to have improved and the overall movement on fresh avocados has improved.

## BEANS

**East:** Bean market has been active with slightly higher FOB prices. Growers have experienced quality issues around the lake but quality is still good out of Immokalee.

**West:** FOB prices continue to be relatively high. Quality is good.

## BLACKBERRIES

Central Mexico blackberry harvests are at the winter peak. Fruit quality on proprietary blackberry varieties is very good. Prices are lower and stable.

## BLUEBERRIES

Chilean blueberries harvests are slowing down as weather in South America is changing. Baja California will also be challenged with shorter harvests. The majority of the blueberry pack out will be in 12 x 6 oz. clamshells, with an increasing number of 12 x 4.4 oz. clamshells during transitions back to domestic blueberries in March and April. Prices have begun to increase.

## BOK CHOY

Steady availability.

## BROCCOLI

Good supplies industrywide. Demand seems slightly less due to tough weather conditions across the nation causing havoc on transportation. Quality remains excellent with no issues.

## CALIFORNIA LETTUCE

**Green and Red Leaf:** Very good supplies on all mix leaf items with strong quality. Green and red leaf will weight 24–25 lbs per case with 10–11" in length.

**Iceberg Lettuce:** Lighter supplies and demand this week. Average sizes. Good quality and weights in the low 40's. The market has improved slightly with occasional higher prices.

**Romaine:** Plentiful supplies with warmer than average temps throughout Southern California and Western Arizona growing regions along with slow demand due to extreme winter weather across much of the country has created a supply exceeds demand situation with very low prices. Quality is only fair with winter defects that have been seen over the last few weeks.

**Romaine Hearts:** Heavy supplies industry wide. Ideal growing weather has been consistent in Yuma, allowing plants to grow. With slow demand and many quality defects, romaine growth for cartons are being stripped down and converted into hearts. Bags will be very consistent with 24–25 oz. range with 11–12" lengths.

## CANTALOUPE

Market has eased a bit on both coasts as arrivals have bumped up and demand has eased a little due to weather. The fruit has excellent sugar and very good color interior and exterior. Expect the market to stabilize this week and should stay steady for the next month and then start to see things strengthen a bit.

## CARROTS

Good supplies from California and Mexico, also Georgia.

## CAULIFLOWER

This week's above average temps should increase volume though supplies are currently steady. No change in quality; remains good with light curds, white to off-white in color, good trim and strong jacket leaves.

## CELERY

Good supplies available in both Oxnard and Yuma. Quality is excellent with dark green color, meaty shanks and packs weighing 57–59 lbs. Demand is very slow (freezing weather in the East coast and South).

## CILANTRO

Plentiful supplies with very nice and full bunches and measuring 9–11". Prices are down from last week.





# FRESH DIRECTIONS



## CUCUMBERS

**East:** Cucumbers continue to be sourced from Honduras with good supplies. Quality is fair and improving.

**West:** Improving volume is putting downward pressure on FOB prices. Quality is variable from grower to grower with pricing reflecting the quality.

## FENNEL/ANISE

Desert growers are now in full production with plentiful supplies.

## FRISÉE

Good availability.

## GARLIC

Chinese garlic is now available in the East, although supplies remain light in Los Angeles. California growers continue to monitor inventories; prices remain firm at the highs. The 2014 crop looks good thus far, scheduled for harvest beginning in July.

## GRAPES

Market has firmed up as arrivals have been a little lighter in the past week, expect the market to stay steady and possibly strengthen on the smaller codes. The overall quality of the fruit is fair to good with brown to green stems and a little rangy in color and size in all codes of reds. The greens are looking pretty good on Thompsons but seeing some light amber in the sugarones. The fruit eats pretty good, just seems to be a range in sugar content in each bunch from 16-20.

## GREEN BELL PEPPERS

**East:** Green Bells are the one commodity that the recent cold spells and rains have affected the most as far as quality and quantity. Short supplies in the East and West are putting upward pressure on FOB markets. Field viruses have showed up causing great fluctuations in yields. FOB prices are up and we do not look for any real relief for at least 3 weeks. Quality fair to poor.

**West:** Volume down due to adverse weather and field conditions. FOB prices up. Quality variable.

## GREEN CABBAGE

Supply and quality for the next few weeks will be very good. Strong supply has caused above average volumes with warm weather expected this week.

## GREEN ONIONS

Plentiful supplies this week. Quality and appearance

continues to be nice. Medium sized onions continue to dominate the pack, followed by a good percentage of smalls and very few larges. With the bad weather nationwide, demand is affected, supplies are backing up and prices have fallen.

## GREEN SQUASH

**East:** Better supplies putting downward pressure on FOB prices. Quality fair to good and continues to improve.

**West:** Volume continues to increase putting downward pressure on FOB prices. Quality variable between growers but good quality can be found.

## HONEYDEW

Market also has eased a bit as better volumes crossing from Mexico and south America, the overall quality of the fruit is excellent as growing conditions have been excellent. The sugars have been very good and fruit is a green to cream color with excellent interior color and condition. Expect the market to stabilize this week and should stay steady going forward after the adjustment.

## IDAHO ONIONS

The market is very firm even though current demand is slow. We do expect to see higher FOB's within the next week to ten days. Depending on what the weather in Mexico will bring, we could see FOB's move very high and fast.

## IDAHO POTATOES

Persistent cold and snow throughout much of the country has caused a slowdown in demand, especially for food-service accounts. The carton market has leveled off and remains very steady. However, transportation is an issue; trucks are extremely light.

## JALAPEÑOS

FOB prices up. Quality good.

## KALE (GREEN)

Supplies are slightly lower this week though should increase to normal by next week. Overall quality and appearance are nice with bunches and lengths measuring 12-14 inches. Currently, demand is very good and prices are trending upward.

## LEMONS

Market steady to strong on 140's and smaller and a little soft on 115's and larger, we are packing Dist. 1&2 fruit and we will continue to pack both districts for the next



# FRESH DIRECTIONS



3-4 months, we expect things to keep pretty steady as we have lost about 30% of the dist., 1 crop therefore we are seeing lighter overall volumes packed on a weekly basis. The overall quality is good with some higher mature fruit showing up, but all fruit has excellent juice content and great color.

## ORANGES

Market steady to strong on all sizes, the overall quality of the fruit is excellent with very good sugar, nice tight rind and great color. We are finding where we were affected by the freeze and will continue to assess going forward some of the ranches are worse than others. Expect the market to keep steady as we have lost at least 30% of the already short crop and things will stay snug going forward especially on 88's and smaller.

## PARSLEY (CURLY)

Increased supplies from last week. Quality is nice with lengths measuring 8-10 inches.

## PARSLEY (ITALIAN)

Plentiful supplies with nice quality and averaging 9-11 inches in length with dark green color.

## RASPBERRIES

Raspberry harvests continue strongest in Central Mexico, with Oxnard steady and a small percentage coming out of Baja. Raspberries are headed toward the spring peak in March. Quality has been very good. Prices have decreased somewhat.

## RED CABBAGE

Steady supplies are expected for the new few weeks. While warm temperatures are ideal for growing, they are influencing sizing in the fields; continued cold in the Southeastern growing areas has slowed supplies considerably.

## SNOW AND SUGAR SNAP PEAS

Plentiful availability in the East, moderate supplies in the West; heavy production volume in Guatemala.

## SPINACH (BABY)

Good availability.

## SPINACH (BUNCHED)

Normal volume with steady pricing. Demand is slow due to the freezing weather in the East. Quality is excellent with good, dark green leaves measuring 9-11 inches in length and nice full packs weighing 20-22 lbs.

## SPRING MIX

Plentiful supplies.

## STRAWBERRIES

Current production is from Florida, Central Mexico, Baja and Oxnard. Central Mexico has come on with increased volume. Florida has also improved in volume and quality. Oxnard already ramping up into the spring. Supplies are significantly better and prices somewhat lower.

## TOMATOES

### EAST

**Rounds:** When weather makes the news it usually means the price of commodities are going up because the weather will affect the supply. However, the weather of this week and recent weeks is having the effect of reducing demand which is putting downward pressure on FOB prices. Good growing weather in southern Florida is helping the volume of product out of that region. FOB prices are down on all sizes. We see a chance of FOB prices falling slightly more in the short term. In March, we look for there to be a drop in volume due to the bloom drop that occurred several weeks ago during the cold snaps. It is appearing that the drop in volume may not be as severe as first predicted. We will keep you posted on these developments. Quality continues to be very good.

**Romas:** Romas are the one tomato commodity that has not seen the rather dramatic drop in FOB prices. Supply and demand have stayed in equilibrium leaving FOB prices down only slightly. Quality continues to be good.

**Grapes:** Supplies are up again this week as demand lags putting downward pressure on FOB prices. FOB prices are down on the 12/1 pints. Quality continues to be good.

**Cherries:** Like grapes, supplies have improved as demand lags. FOB prices are down. Quality is good.

### WEST/MEXICO

**Rounds:** Quality issues are beginning to surface from several growers. The extent of these quality issues and the effect these issues will have on volume, quality and price is yet to be discovered. Crossings continue at Nogales and McAllen. FOB prices are down on the 2-layer vine ripens on all sizes at McAllen and Nogales. Quality is variable.

**Romas:** Puffiness is being reported from most shippers. The degree varies from shipper to shipper. Nogales and McAllen crossings continue. FOB prices continue to be at Suspension Agreement minimums. Quality is variable from shipper to shipper.



# FRESH DIRECTIONS



**Grapes:** Supplies are still improving. FOB prices are down around another \$1.00 on the 12/1pts. Wide range in quality and condition.

**Cherries:** No market is quoted. West continues to pull from the East to meet demand.

## WASHINGTON APPLES AND PEARS

Demand and movement remains strong, continuing to exceed supplies 113's and smaller, mostly lower grades, all varieties. Prices are increasing as export demand continues to outpace supply. Demand on small pears continues to exceed supplies, peaking on 90 and larger. U.S. #1 Bartlett's and Fancy Anjou's.

## YELLOW SQUASH

**East:** Supplies are more in line with demand. Look for FOB prices to be up slightly. Quality is fair to poor due to the recent winds and rains.

**West:** Same as East. Quality variable between growers but good quality can be found.