

FRESH DIRECTIONS

WEST CREEK FRESH

WEEKLY PRODUCE TREND REPORT

For Week Ending February 28, 2014

MARKET OVERVIEW

Excellent quality continues 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 vegetable items 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	PRICE TREND
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, Red Bell Peppers, Zucchini, Cucumbers	Moderate	Good	↔
Green Bell Peppers	High	Good	↑
Grapes – Green Seedless	Extreme	Excellent	↑↑
Red Seedless, Cantaloupes, Honeydews	High	Excellent	↑
Green and Red Cabbage, Kale, Cauliflower, Parsley, (Curly & Italian)	Moderate	Excellent	↔
Bok Choy, Peeled Garlic, Napa	High	Good	↑
Artichokes, Arugula, Carrots, Frisee, Fennel/Anise, Cilantro, Mache, Baby Spinach, Spring Mix	Moderate	Good	↔
Asparagus, Snow and Sugar Snap Peas	Low	Good	↓
Broccoli, Celery, Green Onions, Spinach (bunched)	Low	Excellent	↓
Red Onions, Potatoes	Moderate	Good	↔
Yellow and White Onions	High	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	↑↑



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ARTICHOKES

Good supplies of 12s, 18s and 24s, fair supplies of 30s and 36s. Quality is slowly improving every week. Frost damage appears to be dissipating.

ARUGULA

Expect some yellowing and larger leaf size in wild/baby Arugula.

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 are continuing to adjust. Volume from Mexico was down significantly last week and will be relatively low again this week. The overall movement on fresh avocados has improved. This trend should continue. Chile and California volume is expected to be stable. Some recent rains have been very welcomed in southern and central California, and there should be more in the coming days. Chile should continue with weekly arrivals through early to mid-March. The market outlook for the coming weeks should be characterized by stable volume and price. Avocados remain a strong category from a price, volume, and quality standpoint; however, pricing is up sharply on mid sizes. Mexico will continue its 80% to 85% market share and as dry weight levels increase in the coming weeks on all avocados in the market, consumers will likely keep purchasing high volumes of fresh avocados.

BEANS

FOB prices steady but may become weaker later in the week. Quality variable but good quality can be found.

BLACKBERRIES

Central Mexico blackberry harvests are at the winter peak. Look for continued good harvests in Mexico with moderate temperatures. Fruit quality on proprietary blackberry varieties is very good. Loading points remain Oxnard, Yuma, McAllen and Dover (with pre-planning). 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 packout 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 increased somewhat.

BOK CHOY

Steady availability.

BROCCOLI

Heavy supplies due to this week's weather of 85-90 degrees in Yuma. All sizes and packs available. Demand remains on the weaker side due to tough weather conditions across the nation causing havoc on transportation and heavy broccoli industry wide. Quality remains excellent.

CALIFORNIA LETTUCE

Green and Red Leaf: Very good supplies. Strong quality with 22-24 lbs. per case on green and red leaf.

Iceberg Lettuce: Good supplies continue with excellent quality this week. Averages sizes with weights in the low 40s. Demand has been reduced with adverse weather through the midwest and eastern seaboard.

Romaine: Plentiful supplies industry wide, along with slow demand, is causing the market to remain at lower levels. Quality is great with just occasional light mildew with each head 11-12" long and clean. Carton weights are 38-40 lbs.

Romaine Hearts: Heavy supplies industry wide due to slow demand and warmer weather in growing regions. Quality is improving but still considered fair with 11-12" in length and uniform light cupping with light green color

CANTALOUPE

Market is steady with good volumes on the west and east coast. Expect things to stay fairly steady from where they are now for the next few weeks and possibly start to strengthen towards the middle of March. The overall quality is very good with a green to straw cast, and excellent internal color and sugar.

CARROTS

Good supplies from California and Mexico, also Georgia.

CAULIFLOWER

Good supplies this week. Prices decreased last week as Midwest and east coast demand was reduced by adverse weather. Quality is outstanding with light white curds, good head size and strong jacket leaves.



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CELERY

Supplies available in Oxnard with fair supplies in Yuma. Demand has slowed due to the severe weather experienced on the eastern seaboard. Quality and sizing is outstanding with dark green color, meaty shanks and weights in the 57–59 lb. range.

CILANTRO

Good supplies with nice quality. Bunches are measuring 9–11” and good green color.

CUCUMBERS

East: Cucumbers continue to be sourced from Honduras with good supplies. Quality is fair and improving. FOB prices steady but we look for demand to uptick as the Northeast begins to dig out this weekend of the last winter storm.

West: FOB prices steady. Quality is variable from grower to grower with pricing reflecting the quality.

FENNEL/ANISE

Desert growers are now in full production with plentiful supplies.

FRISSE

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 is steady to strong as the Chilean arrivals have been heavier to the larger codes and not an abundance of the 300 code as we were seeing the last few months. Expect the market to stay strong as we slowly transition to the crimsons and later flames, and you should start to see some fruit with better size as well and better overall quality. Some of the fruit you have been seeing is fruit that was a second crop that matured after the freeze in Chile, therefore not a real strong piece of fruit. Expect good supplies of better quality fruit going forward.

GREEN BELL PEPPERS

East: Supplies are still tight. FOB prices steady. Quality variable between growers.

West: FOB prices steady but we see more volume later

in the week as crops react to extremely warm weather. Quality variable.

GREEN CABBAGE

Supply and quality for the next few weeks will be very good. Size, color and weights are above average and with the anticipated weather, growing conditions should be excellent for the next two weeks.

GREEN ONIONS

Plentiful supplies this week. Quality is excellent. Medium sized onions continue to dominate, followed by pencils and little to no larges available.

GREEN SQUASH

East: Prices steady. Quality fair to good and continues to improve.

West: Good volume on supplies. FOB prices steady. Quality variable between growers but good quality can be found.

HONEYDEW

Market is steady to soft as volumes increase from Mexico and descent volumes arriving from South America. The overall quality is very good out of both areas with a green to cream cast and excellent internal color and sugar. There is a good range of sizes available and expect good availability through the next month and then possibly strengthen depending on weather and demand.

IDAHO ONIONS

The markets on both yellows and reds are moving upward. Most of the movement can be attributed to the lack of product crossing out of Mexico. According to the USDA this time last year there had been 1,332 loads cross out of Mexico, so far this year there has only been 156. That means Mexico is not crossing enough product to affect the domestic market.

IDAHO POTATOES

FOB prices remain mostly steady except for 40's, 50's and both #2's which continue to show weak overtones. Supply in Idaho may start to tight up as growers hold back raw product with expectations of a better market later.

JALAPEÑOS

East: FOB prices up slightly.

West: FOB prices steady. Quality good.



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KALE (GREEN)

Supplies are very good this week. Overall quality and appearance are very nice with bunches and lengths measuring 10–12". Demand is very good.

LEMONS

Market is steady as we are picking in Dist. 1 & 2, with the heaviest volume coming from Dist. 1, the overall quality of the fruit is very good with a nice tight rind and excellent juice content. We will be going with good volumes going forward and prices have started to firm up a little due to dist. 3 completely finished putting all the pressure on the other 2 districts. We expect the summer to be fairly strong as the dist. 2 fruit is again more mature than normal, but hopefully not near as rough as last August and September.

ORANGES

Market is steady with fairly good supplies across the board, the overall quality is very good with good juice content, high sugars and a nice tight rind. We will continue to pack navels through May and possibly longer depending on weather. Expect the 88's and smaller to remain the tightest sizes going forward as this year's crop was smaller than normal therefore bigger size fruit as we are peaking on 56's and 72's. We should start some Valencia's around the end of April and then pack through the summer on Valencia's.

PARSLEY (CURLY)

Supplies have slightly decreased from last week. Quality is very nice with lengths measuring 8–10 inches with dark green color.

PARSLEY (ITALIAN)

Plentiful supplies with very 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 are steady.

RED CABBAGE

Strong supplies are expected for the new few weeks with medium to large head size, clean and dense product. Desert supplies do not reveal any signs of weakness.

SNOW AND SUGAR SNAP PEAS

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

SPINACH (BABY)

Good availability.

SPINACH (BUNCHED)

Perfect growing conditions and high yields. Demand has been slow due to the freezing weather in the East. Overall quality is excellent with large, dark green bunches measuring 11–13" in length and carton weight of 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: Good growing weather continues in South Florida. FOB prices are steady on the 5x6's and are down on 6x6's and 6x7's. Quality out of our fields is very good but there are reports of variable quality from grower to grower. In March, we still look for there to be a drop in volume due to the bloom drop that occurred several weeks ago during the cold snaps. However, it is appearing that the drop in volume may not be as severe as first predicted. We will keep you posted on these developments.

Romas: FOB's are up only slightly as supply and demand continues to stay in equilibrium. Quality continues to be good.

Grapes: Supplies are up again this week as demand lags, especially in the weather plagued northeast. This is putting downward pressure on FOB prices. FOB prices are down again 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: Excessive heat with highs above 95 degrees is causing quality issues to surface from several growers.



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Also, white internal tissue on ripe fruit is being reported. This is caused by a virus spread by the white fly. Crossings continue at Nogales and McAllen. FOB prices are at the Suspension Agreement minimums on the vine ripers. Quality is variable. Supplies of mature greens are much tighter than the vine ripers. Quality is variable.

Romas: Puffiness and softness is being reported from most shippers due to the excessive heat rains. 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.

Grapes: Supplies are still improving. FOB prices are down again 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 on 100 ct. and smaller on all lower grades of just about all sizes. Prices have inched upward. There are some deals on large size red delicious. Pears are steady.

YELLOW SQUASH

East: Supplies are more in line with demand. FOB prices steady. Quality is fair to poor due to the recent winds and rains.

West: FOB prices steady. Quality variable between growers but good quality can be found.