

FRESH DIRECTIONS

WEST CREEK FRESH

WEEKLY PRODUCE TREND REPORT

For Week Ending March 7, 2014

MARKET OVERVIEW

Excellent quality continues for many mixed vegetable items. Persistent adverse weather throughout much of the country continues to cause a slowdown in demand for most items, with the market for row crop vegetable items particularly depressed (broccoli, iceberg, romaine, leaf). Further information regarding romaine from Salinas. Large amount of volume this week and for the next 2-3 weeks has been lost due to poor quality, seeders, clear and brown blister with heavy mildew. Every grower in Yuma is battling the same quality issues and appears that this is the case for them going forward through the balance of the Yuma season.

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	High	Good	↔
Oranges, Navels	High	Good	↑
Limes	Extreme	Good	↑↑
Pineapples	Moderate	Good	↔
Green & Red Leaf, Iceberg Lettuce, Romaine Hearts	Low	Good	↓
Romaine	Low	Fair	↓
Green Beans	High	Good	↑
Yellow Squash, Red Bell Peppers, Cucumbers	Moderate	Good	↔
Green Bell Peppers	High	Good	↔
Green & Red Seedless Grapes, Cantaloupes, Honeydews	High	Excellent	↔
Green & Red Cabbage, Cilantro, Kale (Green), Parsley, (Italian)	Moderate	Excellent	↔
Bok Choy, Peeled Garlic, Napa	High	Good	↑
Artichokes, Arugula, Carrots, Frisee, Cauliflower, Fennel/Anise, Mache, Baby Spinach, Spring Mix, Parsley (Curly)	Moderate	Good	↔
Asparagus, Snow and Sugar Snap Peas	Low	Good	↔
Broccoli, Celery, Green Onions, Spinach (bunched)	Low	Excellent	↔
Potatoes	Moderate	Good	↔
Red, 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, Red Anjous	High	Good	↑
Bosc Pears	Moderate	Good	↑
Zucchini	Low	Good	↔



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APPLES

Prices remain stable. Large sizes are the most plentiful; smaller foodservice fruit is in high demand. Sugar levels measure 12 to 14 Brix (sugar to acid ratio).

ARTICHOKES

Good supplies of 12s, 24s, 30s, and 36s. Quality has significantly improved with most samples having good green color, compact head shape and almost completely free of any type of chill or frost damage.

ARUGULA

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

ASPARAGUS

The California season has just started. The Mexican market is low, but poised to rise; production is slowing. Quality is very good: flavor is grassy and stalks are straight.

AVOCADOS

Prices are inching up slowly. Limited quantities of new crop California fruit are on the market. Mexican stocks are adequate; growers have slowed production. Quality is very good: oil content is high and flavor is nutty.

BEANS

FOB prices lower by several dollars. Quality has improved and is good.

BELL PEPPERS

Red and Yellow: Although high prices persist, the market is expected to ease in 1–2 weeks when Mexican volume increases. Flavor is sweet, yet mildly peppery.

Green: East- FOB prices steady. Quality variable between growers. Supplies expected to improve. The market is unchanged. Florida supplies are adequate. Mexican growers are slowing production in preparation for the transition north in mid-March. Quality is very good; texture is crisp and flavor is zesty.

West- FOB prices steady. Demand is slow. Quality variable.

BLACKBERRIES

The market has eased; supplies are abundant. Expect comparable prices for several weeks. Quality is average: mold and softness are minor issues. Sugar levels measure 12 to 13 Brix.

BLUEBERRIES

Prices are steady. Stocks are sufficient in all growing regions; 12/6-ounce packs from Chile are especially ample. Quality is very good: flavor is sweet and texture is firm. Sugar levels are high, ranging from 14 to 18 Brix.

BROCCOLI

The market is stable near the bottom; demand is weak. Supplies are ample in Arizona, California, and Mexico (into South Texas). California growers are starting to move north to the Salinas Valley; the Arizona desert season will end in a few weeks. quality is very good: crowns are deep green with firm texture and earthy flavor.

CALIFORNIA LETTUCE

Green and Red Leaf: Good supplies. Weights are somewhat high but normal for the end of the Yuma season. Weights per carton will be 24–25 lbs. Growers will move north to Huron and the Salinas Valley in mid to late March. Quality is very good.

Iceberg Lettuce: Lighter supplies forecasted this week. Demand remains low. Lettuce that has been harvested has been very good with medium to medium plus head size, firm, good texture and color with carton weights of 44–46 lbs. The market is low. Volume remains high even though growers are being forced to disc certain fields. Head weights in new fields may not meet specifications.

Romaine: Light demand. Weights will be 36–37 lb. per case with each head 11–13" long. Further information regarding romaine from Salinas. Large amount of volume this week and for the next 2–3 weeks has been lost due to poor quality, seeders, clear and brown blister with heavy mildew. Every grower in Yuma is battling the same quality issues and appears that this is the case for them going forward through the balance of the Yuma season.

Romaine Hearts: Normal supplies. Ideal growing weather in Yuma. Overall industry volume is still strong due to light demand. Romaine hearts are light green in color with light cupping, 11–12 inches in length and pack weights of 24–26 oz.

CANTALOUPE

Market steady with some deals to be made on 12's and 15's, the overall quality is good with mostly green to straw cast and very good interior color and eating well. Expect good supplies of fruit through March and then start to see things firm up in April. We are expecting an earlier start to the California desert as well due to the warmer than normal winter we have been experiencing. Sugar levels range from 11 to 12 Brix.



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CARROTS

Good supplies from California and Mexico, also Georgia.

CAULIFLOWER

The market is stable to slightly lower than last week; volume is sufficient in Yuma, Arizona and California's Salinas Valley. Quality is very good; color is snowy white and flavor is mild.

CELERY

Prices are level; supplies are ample in Yuma and Oxnard, California. The Salinas season will start in June.

CILANTRO

Very good supplies with very nice quality this week. Bunches are measuring 9–11" and good green color.

CUCUMBERS

The market is unchanged; volume is average in Mexico (into Nogales, Arizona and South Texas) and from Honduras (into Florida).

East: Cucumbers continue to be sourced from Honduras. FOB prices are stronger. Quality is good. Harvesting of the late winter Florida crop will begin next week.

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

FENNEL/ANISE

Desert growers are now in full production with plentiful supplies.

GARLIC

Availability is steady and prices remain firm for domestically grown garlic. 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. Chinese whole peeled garlic has returned to the marketplace, characterized by low prices and less than normal shelf life.

GRAPES

Market is steady on both red and green varieties. The overall quality of the fruit is good to fair with some dry stems and some range in color on reds, the color on greens is good with mostly green and very few coming in with any amber. Expect steady supplies through march and then we will see things start to strengthen through April. We are expecting to start in Mexico and California around the end of April which is about 2 weeks earlier than normal due to our mild weather. Green seedless

sugar levels range from 17 to 18 Brix; red seedless sugars range from 22 to 24 Brix.

GREEN CABBAGE

Average supplies with heavy sizing 18–20 count with great color. The market has advanced and should continue into next week as the St. Patrick's Day pull increases. After mid-March, supplies will fall rapidly due to the move to new growing regions.

GREEN ONIONS

Plentiful supplies for this week and the foreseeable future. Overall quality and appearance are very nice with bunches and lengths measuring 10–12".

HONEYDEW

Market softer as there are good supplies of fruit coming in from South America and Mexico, the overall quality of the fruit is very good with a green to cream cast and excellent sugars and interior color. Expect the market to keep steady as supplies should continue to be good through March. Flavor is mildly sweet: sugar levels range from 11 to 13 Brix.

KALE (GREEN)

Plentiful supplies for this week and foreseeable future. Overall quality and appearance are very nice with bunches and lengths measuring 10–12".

LEMONS

Market is steady and firming up as we are harvesting Dist. 1&2, with heavier volume out of Dist. 1, the overall fruit quality is good with a nice tight rind and good interior juice content. Expect quality to continue to be good as our weather has been mild and not any excessive heat or an abundance of rain. This summer we will see things get fairly tight as we are experiencing higher maturity fruit out of dist. 2 due to our mild winter. Flavor is tart, rinds are smooth, and juice content is high: sugar levels range from 6 to 8 Brix.

ONIONS

The market is up; demand is strong. Weather has delayed the start date for the Mexican harvest (into South Texas), limiting overall volume.



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ORANGES

Markey steady with fairly good supplies on both fancy and choice, the overall quality is very good with excellent color and eating quality. We are expecting some rain on Thursday and possibly through the weekend, hopefully that comes to fruition, which could cause us to be tight on supplies for the first part of next week. Expect good supplies of fruit through March and then possibly start to firm up as we will see less utilization due to the freeze. We will probably start Valencias a little earlier than normal (approx. mid April) due to the lack of water. We will need to get some fruit off of ranches that do not have wells to help relieve the trees, and hopefully keep next year's crop on the trees. Depending on what happens the next few months as far as rain will dictate how we schedule harvests.

PARSLEY (CURLY)

Plentiful supplies this week. Quality is nice with lengths measuring 8–10 inches with dark green color.

PARSLEY (ITALIAN)

Steady supplies with very nice quality and bunches averaging 9–11 inches in length with dark green color.

PEARS

The market is unchanged. Prices for small fruit are slightly higher than those for large sizes. Sugar levels range from 12 to 14 Brix.

PINEAPPLE

Prices are increasing; expect stocks to tighten through April. Size flexibility is critical for order coverage. Quality is very good: flavor is sweet. Sugar levels range from 13 to 14 Brix.

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 tight.

RASPBERRIES

High prices are forecasted for another week. Mexican supplies (into South Texas) should become more plentiful, easing the market. Quality is good: color is bright red and flavor is sweet. Sugar levels range from 13 to 14 Brix.

RED CABBAGE

Strong supplies remain this week with medium to large head size, clean and dense product. Market has advanced some as Yuma production finishes and some enduring demand for St. Patrick's Day in the next two weeks.

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)

Good volume this week with very nice weather and strong yields. Overall quality is excellent with large and full, dark forest green bunches. Lengths are 10–11 inches and carton weights are 20–22 lbs.

SPRING MIX

The market is stable; supplies are ample. Quality is very good, although some arugula stocks are exhibiting signs of yellowing and shorter than normal shelf-life due to hot weather.

SQUASH (GREEN)

East: Low FOB prices steady. Quality good and continues to improve. Although Florida stocks remain somewhat tight, volume from Honduras and Mexico is enough to keep prices steady. Quality is very good: texture is firm and flavor is pleasantly bitter.

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

SQUASH (YELLOW)

East: Supplies are good. Low FOB prices steady. Quality is fair due to the recent winds and rains.

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

STRAWBERRIES

Weak demand and ample supplies have kept prices low, but rain may tighten California stocks later this week. Berries are sweet: sugar levels range from 14 to 15 Brix.



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TOMATOES

EAST

Rounds: FOB prices are up on 5x6's and steady on the 6x6 and 6x7's. The weather continues to be favorable. We are within one or two weeks of a decline in volume due to the bloom drop that occurred several weeks ago during the cold snaps. It is still uncertain how much of an effect this decrease in volume will have on FOB prices. Quality is very good.

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

Grapes: Supplies continue to be strong and FOB prices extremely weak. Quality continues to be good.

Cherries: Like grapes, supplies continue to be strong and FOB prices weak. Quality is good.

WEST/MEXICO

Rounds: Quality still variable due to excessive heat (puffiness and softness) and a virus caused by the white fly (white tissue). However, overall quality is improving. Crossings continue at Nogales and McAllen. FOB prices continue at the Suspension Agreement minimums on the vine ripens. Supplies of mature greens continue to be so tight that no market report is available.

Romas: Quality variable from shipper to shipper with puffiness and softness still being reported. Nogales and McAllen crossings continue. FOB prices continue to be at Suspension Agreement minimums. Quality is variable from shipper to shipper.

Grapes: Good supplies. Market steady. Quality variable.

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

WATERMELON

The market is steady at high levels. Fruit is very tight in all growing regions; this year's crop is estimated at 80% below normal. Production should increase in mid-March, easing prices. Melons are sweet: sugar levels range from 12 to 14 Brix.



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