

FRESH DIRECTIONS

WEST CREEK FRESH

WEEKLY PRODUCE TREND REPORT

For Week Ending March 14, 2014

MARKET OVERVIEW

Persistent adverse weather throughout much of the country continues to cause a slowdown in demand for many items. The first significant rainfall of the season hit Central and Southern California growing areas last week, with 2–5 inches occurring in various districts. The strawberry harvest was disrupted in Southern California; desert regions of Southern California and Arizona were unaffected. Drought conditions persist for California growers. An extreme market situation exists for Mexican lime growers, the result of hurricane force winds and flooding that occurred late 2013, with no relief expected until April.

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



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APPLES

The market is unchanged. This year's crop is one to two sizes larger than normal; expect to pay higher prices for smaller fruit as it is tighter. The Honeycrisp season is winding down. 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

Prices are steady to slightly lower than last week. California volume is low but will increase. Production in Mexico is starting to slow; expect supplies to tighten. Quality is very good: flavor is grassy and stalks are straight. MFC Asparagus is available from Mexico; California growers will ship in brand by early April.

AVOCADOS

The market will inch up through this month. California stocks are increasing. Mexican supplies are sufficient; growers are holding back any surplus. Quality is very good: oil content is high and flavor is nutty.

BEANS

East: FOB prices are slightly weaker. Harvesting around the lake continues and quality is very good.

BELL PEPPERS

Red and Yellow: The market remains elevated, but should start inching down in another week. Flavor is sweet, yet mildly peppery.

Green:

East: FOB prices generally steady. Quality generally fair to poor. Some thrip damage evident. Volume is sufficient on both coasts. Quality is very good: texture is crisp and flavor is zesty. Choice Green Bell Peppers are available.

West: FOB prices higher by a couple dollars on all sizes and grades. 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

Expect stable prices for at least one more week. The California harvest will begin in early April. Quality is very good: flavor is sweet and texture is firm. Sugar levels are high, ranging from 14 to 18 Brix.

BROCCOLI

Prices will rise this month; growers are winding down the harvest in Yuma and preparing for the move north to the Salinas Valley. Quality is very good: crowns are deep green with firm texture and earthy flavor.

CALIFORNIA LETTUCE

Green and Red Leaf: Prices are stable. Although supplies are ample, growers are preparing for the move north to Huron and the Salinas Valley in mid- to late March. Quality is very good. MFC Premium Green Leaf is available.

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 has eased a bit but still very good demand and fairly good supplies. The overall quality is excellent and sugars and condition are very good with green to straw cast and excellent internal color. Expect good supplies through April from South America and we could possibly start in the California desert around the end of April as well due to our mild winter. Sugar levels range from 11 to 12 Brix.



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CARROTS

Good supplies from California and Mexico, also Georgia.

CELERY

The market is unchanged; 24-count size stocks are the most plentiful. The desert season is ending, but Oxnard harvests are increasing.

CILANTRO

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

CUCUMBERS

East: The off-shore Honduran crop is winding down and quality is fair to poor. FOB prices are much stronger. Harvesting of the late winter Florida crop should begin this weekend with very light volume. Stronger volume will not occur until the middle or end of next week. FOB prices should respond when supplies increase.

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

FENNEL/ANISE

A gap in supply is anticipated next week, with the harvest finishing in Western Arizona; Salinas will not be ready until mid-March.

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 as we are starting to finish up on flames and moving into crimsons, we will see some flames around for the next couple of weeks, but a majority of the fruit coming will be crimsons. The greens will continue to be Thompsons and sugar ones. The overall quality is fair to good with reds being on the smaller side and green also on the smaller side and eating quality is fair to good as well. We are anticipating starting California and Mexico around the third week of April which is about 2 weeks earlier than normal. Green seedless sugar levels range from 17 to 18 Brix; red seedless sugars range from 22 to 24 Brix.

GREEN CABBAGE

Adequate supplies in California, better availability in Texas. Strong demand for St. Patrick's Day promotions; after mid-March, supplies will fall rapidly in California and new growing regions come online.

GREEN ONIONS

Plentiful supplies. Quality is excellent. Medium sized onions continue to dominate, followed by pencils and little to no larges available. Demand continues to be slow with the adverse weather across the country.

GREEN LEAF/VARIETY LETTUCE

Prices are stable. Although supplies are ample, growers are preparing for the move north to Huron and the Salinas Valley in mid- to late March. Large head size and substantial carton weight (23-25 lbs.).

HONEYDEW

Market is steady with good supplies of all sizes and a few more 8's showing up that we can make some deals on. The overall quality is very good with a green to cream cast and excellent internal color and sugar. We again will have earlier than normal start out of California desert due to our mild winter. Flavor is mildly sweet: sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Prices have increased a bit. Volume has tightened; last week's rain has caused some mildew issues. Expect growers to reduce production over the next several weeks as they prepare for the transition from Yuma to the Salinas Valley. Recent depressed market conditions are slowly beginning to improve for growers, as production is trending lower, toward normal levels. Quality issues are contributing to a reduction in yields caused by mildew and sclerotinia.

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

We have good supplies with excellent demand and fruit condition is good with good juice content and a nice tight rind. We are harvesting out of Dist. 1 & 2, and will continue to do so, through April and possibly into May depending on how the fruit in Dist. 1 holds up. We will continue with Dist. 2 through the summer months and



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supplies might get a little tight around August as we are experiencing higher maturity due to our mild winter. Flavor is tart, rinds are smooth, and juice content is high: sugar levels range from 6 to 8 Brix.

LIMES (PERSIAN)

Lime prices have now reached 70.00 FOB, with no relief expected through the remainder of the month.

ONIONS

Still nothing of significance is crossing out of Mexico. Consequently, the demand in the northwest has been very good and as a result we have further market increase. Yellows are up across the board except for mediums. Reds and whites are up also. Overall quality is average at best, some pressure bruising and exterior mold is being reported. If attempting to stock additional inventory with markets moving so quickly, receivers must understand that the shelf life is not what it was, and quality checks on inventory is critical.

ORANGES

Market is steady with good supplies and very good demand as the fruit is eating exceptional and color and condition are as good as it gets. Expect good supplies going forward and then we will start to see lighter supplies around the end of March and market will probably start to strengthen due to lighter pack outs. The late navels will be lighter than normal due to frost damage, but we will start Valencia's earlier than normal probably around the second week of April due to the lack of water on ranches that do not have wells on them.

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

Prices are level. Large sizes are more plentiful than small. Sugar levels range from 12 to 14 Brix.

PINEAPPLE

The market has stabilized, although supplies are expected to be limited through April. Size flexibility is critical for order coverage. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

The markets really haven't moved to much this week, but that could change. A number of sheds are finishing their Norkotahs and will switch to Burbank's for the balance of the year. Burbank's do not produce the number of cartons that Norkotahs do so the variety switch alone is going to affect offerings. The tightest sizes are 80ct through 60ct. Straight load volume of some of these middle sizes may take an extra day of two to build at most sheds.

RASPBERRIES

The market will remain elevated this week, then stabilize. Mexican fruit (into California and South Texas) is increasing. Quality is good: color is bright red and flavor is sweet. Sugar levels range from 13 to 14 Brix.

RED CABBAGE

Adequate production in California, Florida and Texas.

ROMAINE

Romaine yields have been affected to a greater extent by mildew, compared to iceberg; prices are higher. Prices are up slightly. Last week's rain is causing some mildew problems. Also, most growers are preparing for the transition to Huron and Salinas over the next few weeks. Quality remains very good: growers are culling heads with mildew issues.

ROMAINE HEARTS

Steady availability; romaine hearts are a premium pack, as growers are very selective in maintaining a high quality standard for the pack. Head size is 9–11 inches, with carton weight 23–25 lbs.

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

Prices are steady; volume is average. Quality is very good, although some arugula supplies are exhibiting signs of yellowing and shorter than normal shelf-life.



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SQUASH (GREEN)

East: Supplies much tighter this week especially on the large Zukes. Not enough supply of the large product to meet demand. This is due to pollination issues that occurred earlier. FOB prices are up \$2 to \$4. Quality good.

West: A little less supply this week is putting slight upward pressure on fob prices. Quality variable between growers but good quality can be found

SQUASH (YELLOW)

East: Supplies are tighter than in past weeks putting upward pressure on fob prices. Quality and shelf-life is suspect due to winter winds and rains.

West: Supplies are shorter this week putting upward pressure on fob prices. Quality variable between growers but good quality can be found.

STRAWBERRIES

Prices have increased; last week's rain diminished California and Mexican volume. Once growers cull damaged fruit, the market should level out. Berries are sweet: sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: FOB prices are steady on the 5x6's but are up on the 6x6's and 6x7's as supplies on those sizes tighten. The weather continues to be favorable. However, we see more upward pressure on fob prices in the next several weeks as we enter into a decrease in supply as a result of the bloom drop which was experienced during the earlier cold snap. At the same time, we expect demand to increase due to better weather across the nation. Quality is variable but generally very good to excellent.

Romas: FOB's continue to be steady as supply and demand stays in equilibrium. Quality is very good. We look for a decrease in supplies next week due to the bloom drop.

Grapes: Supplies continue to be strong and fob prices extremely weak. Quality is very good.

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

WEST/MEXICO

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

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. We look for the FOB prices to stay toward the minimum for at least several more weeks.

Grapes: Good supplies. Market steady. Quality variable.

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

TREE FRUIT

Although the market has eased a bit over the past several weeks, overall Chilean supplies remain tight. Sugar levels are low and texture is firm.

WATERMELON

Prices are inching down. Mexican stocks are increasing into Nogales and South Texas. Offshore supplies are tight, but starting to become more plentiful. Melons are sweet: sugar levels range from 12 to 14 Brix.