

FRESH DIRECTIONS

WEST CREEK FRESH

WEEKLY PRODUCE TREND REPORT

For Week Ending March 21, 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. Broccoli and cauliflower markets are starting to gap and prices are climbing. Yuma harvest was more than two weeks ahead of schedule because of the weather. Iceberg and romaine are starting to climb slightly. Transition back to Salinas is getting close, so we're running into some slight supply gaps and heat related issues in the desert. 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, Strawberries	Moderate	Good	↔
Celery, Green Onions	Low	Excellent	↓
Cauliflower	Moderate	Fair	↔
Grapefruit, Honeydews	Moderate	Excellent	↔
Lemons, Oranges, Navels	High	Good	↑
Pineapples	Moderate	Good	↔
Green & Red Leaf, Iceberg Lettuce	Low	Good	↓
Romaine, Romaine Hearts	Moderate	Good	↔
Green Beans, Green Bell Peppers, Yellow Squash	High	Good	↑
Cucumbers, Red Bell Peppers, Zucchini	Moderate	Good	↔
Green & Red Seedless Grapes	High	Excellent	↑
Cantaloupes	High	Excellent	↑
Green & Red Cabbage, Parsley (Curly), Spinach (bunched)	Moderate	Excellent	↔
Bok Choy, Fennel/Anise, Peeled Garlic, Napa	High	Good	↑
Artichokes, Arugula, Broccoli, Carrots, Cilantro, Frisee, Kale (Green), Mache, Baby Spinach, Spring Mix, Parsley (Italian)	Moderate	Good	↔
Asparagus	Low	Good	↓
Red Onions	High	Good	↑
Potatoes	Low to 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

Prices remain level. Large sizes are more plentiful than small. The Honeycrisp season is ending. Sugar levels measure 12 to 14 Brix (sugar to acid ratio).

ARTICHOKES

Good supplies of 12s, 18s, and 24s. Lighter supplies available of 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. However, with recent rains certain lots are showing some damage; black tips and some leaf discoloration.

ARUGULA

Steady availability.

ASPARAGUS

The market is stable, but expected to rise next week. California new crop supplies are increasing. Harvesting is beginning to slow in Mexico, but stocks are ample. Quality is very good: flavor is grassy and stalks are straight.

AVOCADOS

Prices are up slightly. Mexican growers understand that California supplies will be tighter than normal this season, so they are holding back any surplus to keep the market from falling. Oil content is high and flavor is nutty.

BELL PEPPERS

Red and Yellow: Prices are steady. Expect Mexican stocks to increase over the next two weeks. Flavor is sweet, yet mildly peppery.

Green:

East: The market is starting to climb, especially for large sizes. Growers will transition from Mexico to California and from Florida to Georgia over the next four to six weeks. Quality continues to be generally fair to poor.

West: FOB prices higher on mediums and choice. Quality variable.

BLACKBERRIES

Prices inched up slightly, but should stabilize over the next few weeks. Quality is average: mold and softness are minor issues. Sugar levels measure 12 to 13 Brix.

BLUEBERRIES

The market has gone up a bit. Several Chilean shipments have been delayed. The California harvest will begin in early April. Quality is very good: berries are slightly floral and sweet. Sugar levels are high, ranging from 14 to 18 Brix.

BROCCOLI

The market is beginning to climb; growers are ending the harvest in Yuma and starting to move north to California's Salinas Valley. Quality is very good: crowns are deep green with firm texture and earthy flavor. Salinas's blocks are slightly ahead of schedule mainly due to northern weather.

CANTALOUPE

Market fairly steady with very good demand and not an overwhelming amount of volumes arriving. The 9's are much stronger than the 12's and smaller with better supplies of the smaller fruit around. The overall quality of the fruit is excellent with good internal color and sugar and green to straw cast. Expect better supplies in about 2 weeks, which may help ease the market a bit. We are expecting to start California fruit around the first week of May due to our warmer than normal winter. Sugar levels range from 11 to 12 Brix.

CARROTS

Prices have firmed with the harvest well underway in the Imperial Valley of California. Volume price discounts continue to be available from selected shippers.

CAULIFLOWER

The market is stable. The Yuma season is winding down. California's Salinas Valley harvest has begun; supplies are starting to increase. Quality is very good: flavor is mild.

CELERY

Prices remain steady. The Arizona desert season is nearly over; Oxnard stocks are abundant, especially 24- to 30-count sizes. The Salinas season will begin in June.

CILANTRO

Plentiful supplies again this week although soon to be lighter until Salinas begins in April. Bunches are measuring 9-11" and good green color.

CUCUMBERS

The market is unchanged. Mexican volume (into Nogales and South Texas) is adequate.

East: FOB prices have moderated somewhat this week. Honduras crop is practically over and we start back harvesting FL product this week.

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



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FENNEL/ANISE

We are currently in a supply gap, with the harvest finished in Western Arizona; Salinas will not be ready until mid-March. The early season harvest will be characterized by low yields, the result of cold weather that occurred during December and January. Tight availability and high prices will continue through April.

FRISÉE:

Good availability.

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 lower prices and less than normal shelf life.

GRAPEFRUIT

Sunkist Rio Red grapefruit is available with a full run of sizes. Internal color is excellent. Ro Stars continue to move well. Production is expected to reach full capacity. Sizes remain best on 36s smaller for volume. External and internal color are very good. Florida Reds are in good supplies. Sizes are best on 36s smaller with volumes heaviest on 40s -56s. Dark Reds are available, but demand is strong. White grapefruit is also available.

GRAPES

Market is strengthening as we get into crimsons and finishing on flames which is creating a wide range in prices on reds. Green grapes are starting to come in that will be of much better quality and there is also some fruit around that is showing some water berries and discoloration which is fairly reasonably priced with the better fruit keeping strong. We will start to see better #'s of crimsons coming in the next 2 weeks and the market should steady itself. We are expecting to start California and Mexico fruit around the end 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 BEANS

Prices have eased in Florida and are trending higher in Nogales. Fewer planted acres in Mexico this season will support the current market.

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 LEAF/VARIETY LETTUCE

Prices range from low to average. Yuma stocks are ample, even though the season is ending; some growers have started light harvesting in Huron. Quality is very good.

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.

HONEYDEW

Market is steady with descent volumes out Mexico and South America, the overall quality is very good with excellent color and sugar and very strong fruit. Expect volumes to keep fairly steady, but will see some strengthening in about 2 weeks through the first of May until we get started out of California around the first or second week of May. Flavor is mildly sweet: sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Lighter supplies this week. Jumbo sized heads are available with less than average amounts of 30s. Quality is good with weight in the low to 40s. Demand for head lettuce has improved slightly. Strong demand is keeping the market level to slightly higher than last week. Yuma growers are winding down production. Light harvesting

JALAPEÑOS

East: FOB prices stronger this week. Quality good.

West: Market is very active with higher FOB prices. Quality is good. has started in Huron.

KALE (GREEN)

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

LEMONS

Market is steady to strengthening as well as we are going on dist. 1 & 2, volumes are steady and demand is excellent. The overall quality is good with good color, strength and excellent juice content. Expect good



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supplies going forward and expect market to continue strengthening as we slow down on Dist. 1 and depend more on Dist. 2 for our supplies into the summer. We have been talking about the market strengthening and with the higher maturity than normal out of Dist. 2 we will hopefully be able to get through the summer without any major hiccups. 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 85.50 FOB (if available this week) with no relief expected through the remainder of the month.

ONIONS

The market is high. The Mexican season (into South Texas) has been delayed, pushing demand back to the Northwest. Domestic supplies from Texas will be on the market the last week of March. Storage crop pricing has really moved up as the demand for onions is much greater than available supplies. Weather related issues on the new crop from Mexico has prevented normal shipments and yields. Extremely high pricing and tight availability is likely for the next two weeks.

ORANGES

Market is steady to strong as we start to see 88's and smaller really start to strengthen, as we are getting further into the season, and we will see this continue to be the case as we get into late varieties as well in the coming months. The overall quality of the fruit is very good with great color and strength and eating quality is excellent. We will probably start Valencia's around the second week of April due to our water situation and trying to get fruit off the tree and relieve it of the stress of holding 2 crops.

PARSLEY (CURLY)

Good supplies for the next few weeks. Quality is very nice with lengths measuring 8-10 inches with dark green color.

PARSLEY (ITALIAN)

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

PEARS

The market is unchanged. Expect to pay slightly more for 120- to 135-count sizes, as they are the least plentiful. Sugar levels range from 12 to 14 Brix.

PINEAPPLE

Prices are steady despite tight stocks; size flexibility is critical for order coverage. Volume is expected to increase in April. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

The market has stiffened as there appears to be a nice balance between supplies and demand. Fob's should hold firm and possibly move up. You will start seeing fewer and fewer Norkotah offerings as sheds transition to Burbank's. The price difference between the two is also going away, if given the choice between the two always go with the Burbank this time of year as your shelf life will be much better. I also believe that fob prices will start moving now that the Norkotah's are gone. Burbank's produce far fewer cartons and #1's in general than the Norkotah which is another reason we feel the market is looking to move up.

RASPBERRIES

Prices have stabilized. Mexican fruit (into California and South Texas) will continue to increase. Quality is good, but bleeding is a minor issue. Sugar levels range from 13 to 14 Brix.

RED CABBAGE

Adequate production in California, Florida and Texas.

ROMAINE

Romaine supplies are steady. The market is average to slightly higher than last week; demand is strong. Recent rain has caused slight mildew problems. The Yuma season is ending. Light harvesting has started in Huron. Quality remains very good: growers are trimming heads with mildew.

ROMAINE HEARTS

Plentiful supplies industry wide. 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 25-27 lbs. Transition to Salinas starts next week; harvesting in both Yuma and Salinas.

SNOW AND SUGAR SNAP PEAS

A wide range in quality and price exists, depending on growing region, with the primary areas being Mexico and Guatemala.

SPINACH (BABY)

Good availability.



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SPINACH (BUNCHED)

Good volume 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 unchanged; stocks are sufficient. Quality is very good, but arugula supplies continue to exhibit signs of yellowing and shorter than normal shelf-life.

SQUASH (GREEN)

East: Supplies are a little better this week with lower FOB prices. Quality good. Some large green squash has become available again. Although supplies from Florida and offshore are limited, stocks from Mexico are keeping prices steady. Quality is very good: flavor is pleasantly bitter.

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

SQUASH (YELLOW)

East: Supplies continue to be tight with steady FOB prices. Quality continues to be fair.

West: Supplies are short again this week. FOB prices generally steady with upward pressure. Quality variable between growers but good quality can be found.

STRAWBERRIES

The market is stabilizing. Growers are harvesting in California and Florida. Strawberry harvests in general have improved somewhat. Central Mexico and Oxnard are the primary producing districts. Florida will continue to harvest for two more weeks. Driscoll quality remains best of all in the strawberry market. Berries are sweet: sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: As predicted for the last several weeks, we are seeing slight but steady upward pressure on FOB prices as we begin to feel the effects of the bloom drop caused by the cold snap earlier in the winter. FOB prices are steady on the 5x6's but are up on the 6x6's and 6x7's as supplies on those sizes tighten. We look for the supplies to continue to tighten for two more weeks as we work through the bloom drop. After that, supplies should begin to increase back to more normal levels. Mexico will control the market during these two weeks. Any additional movement in prices will be determined by Mexico's ability to supply the shortage with

quality tomatoes. The weather in Florida continues to be favorable. Quality is variable with some growers 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 for the next week or two due to the bloom drop.

Grapes: Supplies are still good but has tightened slightly and fob prices have responded slight upward. Quality is very good.

Cherries: Supplies still good but have tightened from the past several weeks causing fob price to increase from last week. Quality is good.

WEST/MEXICO

Rounds: Quality of the vine ripers is still variable (generally fair to poor but some good fruit can be found) due to excessive heat (puffiness and softness) and a virus caused by the white fly (white tissue). Overall quality is improving. 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 but overall quality is improving. 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 at the minimum. Quality variable.

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

TREE FRUIT

Nectarine, peach, and plum prices are starting to inch down. Chilean stocks are beginning to increase. Expect early season characteristics such as low sugar levels and firm texture.

WATERMELON

The market continues to ease. Mexican volume is increasing into Nogales and South Texas. Offshore supplies are becoming more abundant. Melons are sweet: sugar levels range from 12 to 14 Brix.