

FRESH DIRECTIONS

WEST CREEK FRESH

WEEKLY PRODUCE TREND REPORT

For Week Ending March 28, 2014

MARKET OVERVIEW

Demand for many items is gradually improving from the winter weather that much of the country had experienced. Drought conditions persist for California growers. There are mild quality concerns on all lettuces because of the heat in Yuma. An extreme market situation continues for Mexican lime growers, the result of hurricane force winds and flooding that occurred in 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	High	Very Good	↑
Blackberries, Strawberries	Moderate	Good	↔
Celery, Green Onions	Low	Excellent	↓
Arugula, Cauliflower, Frisee, Snow & Sugar Snap Peas, Baby Spinach, Spring Mix	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, Yellow Squash	High	Good	↑
Green Bell Peppers	Extreme	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, Kale (Green), Red Cabbage, Spinach (Bunched)	Moderate	Excellent	↔
Broccoli, Carrots, Cilantro, Green Cabbage, Parsley (Italian & Curly)	Moderate	Good	↔
Mache	High	Fair	↑
Asparagus, Green Onions	Low	Good	↓
Red Onions	High	Good	↑
Potatoes	Moderate	Good	↔
Yellow and White Onions	Extreme	Good	↑↑
Round, Roma, Plum Tomatoes	Moderate	Good	↔
Cherry, Grape Tomatoes	High	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 overall market is stable, but prices for small sizes are a bit higher. The Honeycrisp season is over. Sugar levels measure 12 to 14 Brix (sugar to acid ratio). MFC Fuji, Gala, Granny Smith, Golden Delicious, and Red Delicious Apples are available.

ARTICHOKES

Volume is increasing. Peak sizing remains large to extra large (12s and 18s). Good supplies of 24s. Lighter supplies of 30s and 36s. Quality has significantly improved with most samples having good green color, dense and compact heads with no scarring or discoloration.

ARUGULA

Tight availability caused by late-season quality issues (mildew, aphids).

ASPARAGUS

Prices are starting to climb. Although California new crop stocks are on the market, they remain tight. The Mexican season is wrapping up. Expect an elevated market over the next four or five weeks. Quality is very good: flavor is bright and grassy.

AVOCADOS

The Avocado market continues to see strong volumes from Mexico and Chile and now California with mostly 70's and 84's. Pricing has remained strong on 60's and larger through this week. Despite the current FOB pricing being in the mid to high \$30's on these sizes, demand has been excellent since the Super Bowl. Growers in Mexico are watching markets carefully and the Mexican avocado industry continues to increase the cost of fruit. Although their market share has dropped to 75%, Mexico is still the market leader and as a result the pricing in the U.S. will remain at least partially controlled by the field prices in Mexico. Look for FOB pricing to increase at least a few dollars a box in the coming weeks. Although California will contribute with additional supplies, it will not provide much price relief for 48's and larger. Chile, meanwhile will continue with weekly arrivals averaging 3 to 4 million lbs. through the end of March. The fruit is eating well, but has a very limited shelf life. Promotional opportunities should still be strong in April, as volumes will be reliable and quality will be excellent. As the start of spring begins next week, pricing will indeed be higher.

BELL PEPPERS

Red and Yellow: The market is unchanged. Mexican volume continues to increase; prices should ease over the next two weeks. Flavor is sweet, yet mildly peppery.

Green:

East: Supply extremely tight as we are in a gap situation. Prices up. We expect more volume as the FL spring crop starts up either next week or the week after that. Quality continues to be generally fair to poor.

West: Extremely tight supplies on the larger sizes. More availability on the smaller sizes. Quality variable. Growers will soon transition on both coasts (from Mexico to California and from Florida to Georgia), tightening supplies and pushing up prices, especially for large sizes. Quality is very good: flavor is zesty.

BLACKBERRIES

Continued tight availability for conventional blackberries from Central Mexico. The harvest transition out of Mexico back to California is moving very slowly. Expect one more week of serious blackberry shortages. With lower availability prices have increased somewhat. Quality is average: mold and softness are slight problems. Sugar levels measure 12 to 13 Brix.

BLUEBERRIES

Blueberry harvests are done in South America and transitions back to domestic harvests in Florida and California are underway. Mexico has provided an important transition point in mostly 12 x4.4 oz. clamshells. Larger packs will be back in late April when U.S. production increases. During harvest transitions prices will continue to increase somewhat. Quality is very good: berries are slightly floral and sweet. Sugar levels are high, ranging from 14 to 18 Brix.

BROCCOLI

The market is rising; growers are moving production from Yuma, Arizona to California's Salinas Valley. Stocks are limited; freezing temperatures last December caused bloom drop, destroying many plants that were scheduled to be harvested now. Quality is very good: crowns are deep green with firm texture and earthy flavor.

CANTALOUPE

The market is slightly higher than last week. Offshore growers are transitioning from Honduras and Costa Rica to Guatemala. The Mexican season will start in early April. Quality is very good: texture is firm, yet juicy. Sugar levels range from 11 to 12 Brix.

CARROTS

Good availability in all growing regions; California, Mexico, Georgia.



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CAULIFLOWER

The market is steady. The Yuma season is ending. Salinas Valley stocks are increasing. Quality is very good; flavor is mild.

CELERY

Prices are level. Although the Arizona desert season is wrapping up, Oxnard stocks are ample. The Salinas season will begin in June.

CILANTRO

Continued plentiful supplies this week although soon to be lighter until Salinas begins on Monday, March 31st. Bunches are measuring 9- 11" and good green color.

CUCUMBERS

East: Back into FL crop. Prices generally steady.

West: FOB prices generally steady. Quality is variable from grower to grower with pricing reflecting the quality. Although the new crop season has begun in Baja, Mexico (into San Diego, California), volume is low. Texture is firm, color is deep green, and flavor is mild, yet refreshing.

FENNEL/ANISE

New crop anise will become available in Salinas late this week. 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:

Tight availability, fair quality due to seeders.

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 36's smaller for volume. External and internal color are very good. Florida Reds are in good supplies. Sizes are best on 36's smaller with volumes heaviest on 40's-56's. Dark Reds are available, but demand is strong. White grapefruit is also available.

GRAPES

The Chilean market is inching up slightly; growers are transitioning to different varieties. Green seedless sugar levels range from 17 to 18 Brix; red seedless sugars range from 22 to 24 Brix.

GREEN CABBAGE

Normal supplies this week as Yuma production winds down. With St. Patrick's Day demand complete, the market is expected to decline over the next few weeks.

GREEN LEAF/VARIETY LETTUCE

Good supplies this week. Quality is strong and 20- 22 lbs. (The only possible issue of dehydration from the high temps in Yuma.) Some supplies will be from Salinas this week with the majority out of Yuma.

GREEN ONIONS

Plentiful supplies with good quality. 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

Prices are inching up. Mexican growers are transitioning to new northern harvesting regions. Offshore growers are moving to Guatemala. Flavor is mildly sweet: sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Good supplies this week in Salinas. Few jumbo sized heads are now being produced with less than average amount of thirties. Quality is good with weights in the low to mid-forties. Prices should be steady to higher. Quality problems in Yuma include mildew, Sclerotinia, and pink discoloration due to high heat. Industry demand continues to improve as the mid-west and east coast are beginning to purchase. Harvest in Huron has started with Yuma and Salinas scheduled for April 7th.

JALAPEÑOS

East: FOB prices continue strong but generally steady. Quality good.

West: Slightly more supplies available with downward pressure on FOB prices. Quality is good.

KALE (GREEN)

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



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LEMONS

165's/200's/235's fancy but mostly choice will be the volume size lemons through the summer months. 140's and larger will be less available and more expensive as we go forward.

LIMES (PERSIAN)

Lime prices have reached 85.50 FOB (if available this week); LA market is now over \$100.00. No relief expected through the remainder of the month.

ONIONS

Most all the supply in Idaho should be gone between April 1-15th. FOB prices have gone up steadily each week but we may be nearing a stable trading range although it is extremely high. Texas is still looking pretty good as our next growing area. New Mexico and California have excellent crops in the ground as well. This market has peaked, don't see FOB going up from here. USDA Today reported Mexico has crossed just under 1000 loads this week. Over the previous three weeks, numbers were closer to 200-300 for a week or less. With a few more shipments crossing that could take the wind out of the sails of these onion growers. If these crossing numbers increase, don't be surprised if you pick up a few "deals" before Idaho wraps it up.

ORANGES

Minor suppliers are beginning to finish up. Major suppliers will ship through late April, early May. Mostly late navels available with sizing mainly 72s. The California Navel market is high; fruit is limited. Growers in Texas have started shipping the Valencia variety. Valencias have started with same pricing as navels; mostly going export. Growers in Texas have started shipping the Valencia variety.

PARSLEY (CURLY)

Light supplies will continue until harvesting begins out of Salinas on Monday, March 31st. 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

Prices are level, yet the market for 120- to 135-count sizes is a bit higher. Sugar levels range from 12 to 14 Brix.

PINEAPPLE

Currently, 5's and 7's are the tight sizes with better availability on 6's and 8's. Stocks will increase in April. Fruit is juicy and sweet: sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

The FOB price difference between varieties is now mostly gone. With most sheds shifting to Burbanks we are seeing FOB prices moving up again for the second week in a row. This is the first back to back weeks this season that we have seen FOB increases. The best value is still with the 40's and 50's and we really won't be seeing any upward movement on the #2's for the week. Most of the activity in Idaho is with the 90ct through 60ct. The market increases will not be significant but it is offer us a probably trend over the next couple months.

RASPBERRIES

Raspberry harvests have slowed in Central Mexico. Oxnard growers report slightly lower yields coming back to California. Prices are slightly higher with lower production. Quality is good, but bleeding is a slight problem. Sugar levels range from 13 to 14 Brix.

RED CABBAGE

Red cabbage supplies and market should remain steady through the next few weeks.

ROMAINE

Harvesting in both Yuma and Salinas this week. Quality remains good in both locations. Carton weights 37- 39 lbs. and each head 11- 12" long. Product is nice though there could be some minor issues that arise with heat in Yuma (90+ degrees). Demand is gradually improving as parts of the country begin to thaw out from the effects of an extreme winter.

ROMAINE HEARTS

Good supplies industry wide. Demand is gradually improving but with multiple growing regions, supplies still exceed demand. Warm weather is causing some quality issues; mildew, fringe and tip burn. Overall, appearance is nice with light green color and weights 25-26 oz. Lengths are 11-2 inches.

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.



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SPINACH (BABY)

Tight supplies.

SPINACH (BUNCHEDED)

Yields are strong due to ideal growing weather. Demand continues to remain steady with moderate pricing. Quality is excellent featuring large and full, dark green bunches. Lengths are 10-11" and carton weights range from 20-22 lbs. Northern growing district in Salinas to start on Monday (March 24th); Salinas's volume projected to be approximately half.

SPRING MIX

Prices are level. Quality is very good, although recent hot weather has increased high respiration rates and may reduce shelf-life, especially in arugula.

SQUASH (GREEN)

East: Supplies are tighter with higher FOB prices on all sizes. Quality good.

West: Supplies tight. No wire-bound available. FOB prices up. Quality variable between growers but good quality can be found.

SQUASH (YELLOW)

East: Supplies continue to be tight with higher FOB prices. Quality continues to be fair but will suffer due to scarring due to the high winds.

West: Supplies are short again this week with higher FOB prices. Quality variable between growers but good quality can be found. The market is rising, especially for yellow squash. Mexican growers are transitioning to new harvesting regions. Quality is very good: flavor is pleasantly bitter.

STRAWBERRIES

Strawberry harvests have improved overall, drawing from a wide range of regions. Central Mexico, Baja and Oxnard are the primary producing districts. Santa Maria has just begun strawberry harvests. Florida will continue to harvest for two more weeks. Strawberry prices have been reduced with increased availability. Driscoll quality remains best of all in the strawberry market. Berries are sweet; sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: Volume is down sharply this week as the result of the bloom drop that we have been writing about for the past several weeks. We are looking for the volume to

be down for the next two weeks. FOB prices are up on all sizes. Quality is variable with some growers but generally very good to excellent.

Romas: FOB prices are up for the first time in over a month. Prices are up while quality remains very good.

Grapes: Grape supplies have decreased dramatically which has caused FOB prices to increase by \$5 or more. Quality remains very good.

Cherries: Supplies much tighter. FOB prices up. Quality is good.

WEST/MEXICO

Rounds: Market is unsettled adapting to the sharp drop in volume coming out of FL. Overall quality is improving. Crossings continue at Nogales and McAllen. FOB prices generally steady but with upward pressure. 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 continues to improve. Nogales and McAllen crossings continue. FOB prices continue to be at Suspension Agreement minimums with some higher prices also being reported. Quality is variable from shipper to shipper.

Grapes: FOB prices are higher by \$4. Quality variable.

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

TREE FRUIT

The market is elevated. Although supplies have been limited for several weeks, the season is already past its peak. Expect high prices and low volume until the California season starts in late May/early June. Quality is average: sugar levels are low.

WATERMELON

Prices are easing; stocks are adequate. Mexican fruit is available in Nogales and South Texas. Offshore melons are being shipped to both coasts. Melons are sweet: sugar levels range from 12 to 14 Brix.