

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending April 4, 2014

## MARKET OVERVIEW

Demand continues to gradually improve 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. Important note on tomato sizing: Extra large tomatoes (5x6 and larger) are extremely tight due to nonexistence in both the east and the west. The cause is the bloom drop that we first noted to you back in January. The shortage will worsen as the week progresses and will continue for about two weeks when Ruskin should begin to harvest. The price difference during the next two weeks between Extra Large and Large will be as much as \$3, and \$5 between the Extra Large and Mediums. For customers who have the flexibility of using a smaller tomato, it would be advantageous for all parties to steer them in that direction. Regardless, expect Extra Large tomatoes to be in short supply and toward the minimum size.

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



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## APPLES & PEARS

The majority of prices are steady, but the market for small sizes is slightly higher. The Honeycrisp and Jonagold seasons have ended. Sugar levels measure 12 to 14 Brix (sugar to acid ratio). Demand and movement remain steady on both apples and pears. Lower grades are in tight supply 113's and smaller. Export demand is excellent, 100 smaller and at higher dollars than domestic causing prices to increase on 80's and smaller for all varieties. Volume price discounts are available from selected shippers on large sized Red Delicious apples (72's and larger).

## ARTICHOKES

Volume continues to increase. Peak sizing remains large to extra-large (12's – 24's). Quality is excellent with most samples showing good consistent green color, compact heads and uniform sizing. Forecasted rain this week should have no adverse effects on the quality.

## ARUGULA

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

## ASPARAGUS

Good availability currently with numerous growing areas in California and Mexico. Upward pressure is building in the market with strong demand for Easter retail ads combined with tightening supply, as the Southern districts (Imperial Valley, Mexico) wind down for the season. We can expect to see a strong advance in prices to begin soon. The Mexican and Peruvian seasons are ending. Expect high prices for the next month.

## AVOCADOS

Avocado supply and demand both remain very strong. Chile & California are contributing but Mexico is still in the lead. Growers and importers are working overtime to keep up with demand. 48's and larger have continued to see increased FOB pricing, while 60's and smaller remain generally stable. The field prices in Mexico and the movement of inventories the next couple weeks will be crucial in assessing where the market will be in mid-April. While pricing will likely be stable, the only really certain thing that one can expect is that volume will be strong. Growers, importers, and the promotional boards will be working closely with retailers to keep demand strong and to keep avocados a central part of the Cinco de Mayo holiday.

## BELL PEPPERS

### Green:

**East:** Supply tight as we continue in a gap situation and rains have hampered harvesting. Prices continue strong. We expect more volume within the next week. Quality continues to be generally fair to poor. The rains this past week have not helped quality.

**West:** Tight supplies. Prices generally steady. Quality variable. The market is rising; supplies are scarce on both coasts, especially large sizes. Flavor is zesty.

**Red and Yellow:** Prices will climb through mid-May, when the California season starts. Flavor is sweet, yet mildly peppery.

## BLACKBERRIES

The market remains slightly higher than normal for this time of the season, but should stabilize by next week. The California harvest will begin in early June. Quality is good: mold and softness are minor issues. Sugar levels measure 12 to 13 Brix.

## BLUEBERRIES

Prices are starting to climb. The Chilean season is winding down. The California harvest will begin in mid-to late April; prices will inch up until that time. Quality is very good: berries are slightly floral and sweet. Sugar levels are high, ranging from 14 to 18 Brix.

## BROCCOLI

The market has inched down to average. Harvesting has increased in Santa Maria, California and Mexico. The Yuma, Arizona season is ending. Expect the market to ease through next week. Quality is very good: crowns are deep green with firm texture and earthy flavor.

## CANTALOUPE

Market is steady to strong as volumes are lighter especially on the west coast, expect market to continue to keep strong for the next 7-10 days and then start to see some more volume arriving. The overall quality of the fruit is very good with good color and sugar content with mostly a straw to green cast, some fruit showing some sunken areas but for the majority of the fruit quality is very good. We expect to get started around the first week of May in California, which is about 2 weeks earlier than normal. Mexican production will begin in early April. Quality is very good: texture is firm, yet juicy. Sugar levels range from 11 to 12 Brix.





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## CARROTS

Prices have firmed slightly in California and Georgia; good availability from Mexican growers, loading in McAllen, Texas.

## CAULIFLOWER

Salinas Valley cauliflower production and quality have improved. Slightly lower volume this week. Quality is very nice, medium plus white curds, good green jacket leaves with weights between 28-32 lbs.

## CELERY

Multiple regions are producing high yields and demand is very slow. Quality is strong in all regions. Celery markets remains depressed. Sizing is very strong to the larger sizes.

## CILANTRO

Lighter supplies this week. Salinas harvest begins on Monday, March 31. Bunches are measuring 8-10" and good green color. Prices have increased this week due to lighter supplies coming out of Mexico.

## CUCUMBERS

**East:** Back into FL crop. Prices are elevated. Florida volume is low. Mexico's new crop season has begun in Baja, into San Diego, California; supplies are tight, but increasing.

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

## FENNEL/ANISE

Tight availability and high prices will continue through mid-April when production is expected to increase.

## FRISSEE:

Tight availability, fair quality due to seeders.

## GARLIC

The new crop California harvest will begin in June; everything looks good thus far.

## GRAPEFRUIT

Sunkist Rio Red grapefruit is available with a full run of sizes. Internal color is excellent.

## GRAPES

Market very strong on red grapes as we will not see another arrival to the west until around April 2, therefore lots of fruit being shipped from the east coast to the west coast, keeping both regions very tight and strong especially on the med/lrg codes. There will be some better volume arriving next week on the east coast and

west coast. The market is expected to stay strong until the end of next week and depending on demand, it might keep steady as the last of the bots heading to the USA have loaded and will arrive around the 15th of April. The green grapes are split due to quality and some discolor. The storage fruit is solid and in great condition which is about \$6-\$8 higher. Green seedless sugar levels range from 17 to 18 Brix; red seedless sugars range from 22 to 24 Brix.

## GREEN CABBAGE

Southern production for cabbage is about to finish. This week will be above average in supplies.

## GREEN & RED LEAF

Plentiful availability for new crop in Huron (Central San Joaquin Valley); the late season harvest continues in Yuma (Western Arizona).

## GREEN ONIONS

Plentiful supplies with good quality. Medium sized onions continue to dominate, followed by pencils and very little larges available.

## HONEYDEW

Market stronger as Mexico volumes very light, the overall quality on the South American fruit is very nice with a green to cream cast and good internal color and sugars out of both regions. We expect to get started in California around the first week of May as well. Mexican production will ramp up by the first week of April. Flavor is mildly sweet: sugar levels range from 11 to 13 Brix.

## ICEBERG LETTUCE

Demand has slowed for lettuce. Production from Yuma remains strong. For many shippers, Huron's lettuce started last week with higher volume projected due to increase yields. Both regions producing will cause an oversupply situation for the next week and several days. Quality is fairly good with medium sized firm heads, slightly pale coloring and carton weights of 42-46 lbs.

## JALAPEÑOS

**East:** Supplies short. Going to MX to meet demand.

**West:** More supplies available with FOB prices down as much as \$4. Quality is good.

## KALE (GREEN)

Plentiful supplies this week and for foreseeable future. Harvesting begins out of Salinas on Monday, March 31. Overall quality and appearance are very nice with bunches and lengths measuring 12-14".



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## LEMONS

Market is steady and also strengthening as we are picking in both Dist. 1&2, our utilization % on Dist. 1 fruit is all over the board due to the freeze, therefore keeping the market very strong. The overall quality of the fruit is good out of both districts with good juice content and excellent color. Expect the market to continue to strengthen in the coming months due to our lighter pack outs and trying to stretch out dist. 2 fruit as long as possible to help get through the summer. The dist. 2 fruit is more mature than normal due to our warmer than normal winter. Flavor is tart: sugar levels range from 6 to 8 Brix.

## LIMES (PERSIAN)

The market remains at a historic high. Expect low volume, especially 110- to 200-count sizes, through April. Quality is average, but brown spotting and scarring are sporadic issues.

## NAPA

Demand exceeds supply with the harvest in the desert essentially finished.

## ONIONS

Pricing out of both the Northwest and Mexican product in South Texas continue to be steady. Growers in the Northwest continue to finish for the season as each week passes. While Mexico has increased their volume on loads shipping into South Texas, rain in Mexico has delayed arrival of product into South Texas. There is a shortage of red onions in both South Texas as well as the Northwest, and pricing is expected to increase. White onion supply in South Texas is exceeding demand, and FOBs have dropped. The Texas crop should begin shipping within the next one to two weeks.

## ORANGES

Market steady to strong as we are packing descent volumes and demand is very good on all sizes. The fruit is of excellent quality, with great color and nice tight rind, but unbelievable sugar as well. We expect to be in navels until the end of May, but expect prices to strengthen as we get into the late varieties and overall volume of navels will be lighter than normal due to the freeze and lower utilization numbers. We expect to start Valencia's around the third week of April and possibly sooner depending on demand.

## PARSLEY (CURLY)

Light supplies will continue until harvesting begins out of Salinas on Monday, March 31st. Quality is nice with lengths measuring 8-10 inches with dark green color.

## PARSLEY (ITALIAN)

Good supplies now out of Salinas with nice quality and bunches averaging 9-11 inches in length with dark green color. Prices are up a bit from last week.

## PINEAPPLE

Prices are steady despite supply shortages; size flexibility is critical for order coverage. Volume will increase in early April. Fruit is juicy and sweet: sugar levels range from 13 to 14 Brix.

## POTATOES (IDAHO)

The market remains steady as supplies about meet demand this week. FOB on cartons remain stable, with supply on mid-size cartons (60ct through 80ct) being tight. Consumer bags are available in good supply and are exceeding demand. Norkotahs are mostly finished for the season, and lower inventories are causing growers to remain firm on count cartons.

## RASPBERRIES

Raspberry harvests have improved in Central Mexico. Oxnard growers report higher yields coming back to California. Raspberries fruit quality continues to be very good. Prices have stabilized and will likely decrease in the next few weeks.

## RED CABBAGE

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

## ROMAINE

Very steady supplies for the next few weeks. Transition for all leaf items to Salinas will begin April 7. Fair demand continues with low prices holding. The effects of the weather related damages to quality are still being seen; irregular head sizing, light mildew and occasional fringe/tip burn.

## ROMAINE HEARTS

Steady supplies. Demand is slightly improved as many suppliers begin transition to northern districts causing a slight increase in price. Warm weather continues to cause quality to be affected; mildew, fringe/tip turn and irregular shape. However, best possible product is being packed.

## 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)

Tight supplies going into next week. Growers anticipate normal production by early April.



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## SPINACH (BUNCHEDED)

Yuma is finishing early and Salinas will soon begin. Demand is excellent with light supplies causing a stronger market. Quality is good with very light insect damage. Spinach is showing dark green color, large full bunches, 9-11 inches in length and carton weights of 2 to 21 lbs.

## SPRING MIX

Shippers are getting ready to wind down the season in Western Arizona. Quality will be much improved when the harvest gets going in Watsonville-Hollister-Salinas next week. Selected shippers are already sourcing various components of the mix from the Central San Joaquin Valley, where quality is more favorable, to be included in processing the final product in Yuma.

## SQUASH (GREEN)

**East:** Supplies are still tight with slight downward pressure on FOB prices. Quality good.

**West:** Supplies tight. No wire-bound available. FOB prices steady with upward pressure. Quality variable between growers but good quality can be found.

## SQUASH (YELLOW)

**East:** Supplies continue to be tight with generally steady FOB prices. Quality continues to be fair due to scarring due to the high winds.

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

## 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 strawberry harvests will finish this week. Strawberry prices have been reduced with increased availability. Driscoll quality remains best of all in the strawberry market.

## TOMATOES

### EAST

**Rounds:** Volume continues to be down again this week as the result of the bloom drop and rains this week. Sizing is the biggest challenge. Prices of 5x6's are up with additional strong upward pressure. Price of Large tomatoes is stable. Mediums are down as we are currently in the 3rd picking of our Immokalee fields. Quality is variable with some growers but generally continue to be very good to excellent.

**Romas:** FOB prices are up slightly again this week. Quality remains very good.

**Grapes:** Grape supplies continue to be tight and FOB prices are higher this week. Quality remains very good.

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

## WEST/MEXICO

**Rounds:** Large sizes are tight in MX. Prices up sharply for both vine ripers and mature greens—over \$5 higher for larger sizes. Crossings continue at Nogales and McAllen. Supplies of mature greens continue to be so tight that no market report is available. The quality of the mature greens is good.

**Romas:** Nogales and McAllen crossings continue. FOB prices have moved up from the suspension agreement minimums by a couple of dollars. Quality is variable from shipper to shipper.

**Grapes:** FOB prices are higher by \$3. Quality variable.

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

## TREE FRUIT

Prices are high. Stocks have been limited for the entire Chilean season due to freezing temperatures last December. The market will remain elevated until the California season begins in late May/early June. Quality is average: sugar levels are low.

## WATERMELON

The market continues to inch down; supplies are increasing in all regions. Mexican fruit is available in Nogales and South Texas, while offshore melons are being shipped to California and Florida. Melons are sweet: sugar levels range from 12 to 14 Brix.