

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending April 11, 2014

MARKET OVERVIEW

Demand has increased on lettuce items causing the market to rise slightly. Quality on several is being challenged by the recent warm weather. The extreme market situation continues for Mexican lime growers, the result of hurricane force winds and flooding that occurred late 2013, with no relief expected in the near future. Though the rain has been much needed, it has caused some citrus supply problems for many varieties; however dry and warm conditions are expected for Central California through the weekend with a slight chance of rain. Afternoon highs in Yuma are below average (upper 60s–low 70s), but expected to warm up to the upper 70s–low 80s through Saturday. Morning lows range in the low to upper 40s and will cool tomorrow into the upper 30s–low 40s with light lettuce ice possible in eastern Yuma valleys.

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



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APPLES & PEARS

Most of the market is level, yet prices for small sizes are a bit more. Sugar levels measure 12 to 14 Brix (sugar to acid ratio). Most D'Anjou prices are level, but the market for 120- to 135-count sizes is a bit higher. Sugar levels range from 12 to 14 Brix.

ARTICHOKES

Strong supplies this week. Great supplies of 12s, 18s and 24s. Lighter supplies of 30s and 36s. Production is peaking on 12s and 18s. Artichokes are frost-free and in excellent shape (good green color and tight compact heads).

ARUGULA

Good availability in Central California.

ASPARAGUS

Prices continue to climb. California new crop stocks will increase later in the month. The Mexican and Peruvian seasons are winding down. Expect an elevated market through April.

AVOCADOS

The market is up. California new crop supplies are starting to increase, but most fruit is from Mexico; growers are holding back any surplus. Oil content is high and flavor is nutty.

BELL PEPPERS

Green:

East: Supply has improved putting downward pressure on FOB prices. We expect more volume to continue to improve. Quality improving

West: Supplies improving. Prices generally lower. Quality variable.

Red and Yellow: Prices are expected to inch up through mid-May, when harvesting begins in California. Flavor is sweet, yet mildly peppery.

BLACKBERRIES

The market is a bit higher than normal, but should remain steady through April. The California season will begin in early June. Quality is good: mold and softness are slight problems. Sugar levels measure 12 to 13 Brix.

BLUEBERRIES

Prices are rising. The Chilean harvest is wrapping up; late vessel arrivals are causing shortages. The California season will start in mid- to late April. Quality is very good: berries are slightly floral and sweet. Sugar levels are elevated, ranging from 14 to 18 Brix.

BROCCOLI

The market is stable. Rain could slow production this week, but prices should remain level. Quality is very good: bracketing and pin rot may become problems after the rain.

CANTALOUPE

Market is steady with the west coast fruit much stronger due to less volume. The overall quality of the fruit is very good with excellent interior color and sugar, and green to straw cast. Most lots are very firm and fruit is eating excellent. We are expecting to get started in the California desert around the first of May. Our weather has been warmer than normal and fruit quality should start out very nice. Sugar levels range from 11 to 12 Brix.

CARROTS

Supplies are steady in California and Georgia; plentiful availability from Mexican growers, loading in McAllen, Texas.

CAULIFLOWER

The market is steady. This week's rain and cooler temperatures could impede harvesting; next week, prices may rise. All sizes are available. Quality is very good: flavor is mild.

CELERY

Prices are stable; Oxnard supplies are ample, especially large sizes. Harvesting will begin in the Salinas Valley in June.

CUCUMBERS

East: Continue harvesting FL crop. Supplies continue to be good. FOB prices generally steady.

West: FOB prices generally down but are expected to firm up as growers get cleaned up. Quality is variable from grower to grower with pricing reflecting the quality.

FENNEL/ANISE

Limited availability and high prices will continue through late April, with production down by 50 percent.

FRISSE:

Tight availability.

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. Rio Stars continue to



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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 strong as we have not seen an arrival on the west coast since March 20th, though an arrival is coming very soon. The east coast does have supplies but prices have strengthened due to the lack of supplies out west. Expect prices to keep steady until we start California and Mexico around the first of May, the crop looks good out of both regions and earlier than normal, therefore we do not expect a gap. The overall quality of the Chilean crimsons is very good and eating excellent. Green seedless sugar levels range from 17 to 18 Brix; red seedless sugars range from 22 to 24 Brix.

GREEN BEANS

Prices will remain firm through Easter; new crop now available in Coachella.

GREEN CABBAGE

Green cabbage will finish this week in Yuma. Market conditions remain depressed. The quality has been very nice with good head sizing and insect damage at a minimum.

GREEN LEAF LETTUCE

The market is climbing. Huron and Salinas volume is average; this week's rain may further tighten supplies and cause mildew problems.

GREEN ONIONS

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

HONEYDEW

Market has eased a bit with better supplies and very nice fruit; the interior color and sugars are excellent and fruit is firm and strong. We expect to get started out of the California desert around the first week of May, and expect excellent quality as weather has been ideal for melons. Flavor is mildly sweet: sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

The Yuma season ends this week. Growers are harvesting in Huron, Santa Maria, and Salinas. This week's rain may slow production and cause mildew issues.

JALAPEÑOS

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

West: More supplies available with FOB prices down again this week. Quality is good.

KALE (GREEN)

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

KIWI

As we move into the Chilean season, kiwi availability will continue to tighten. At least 50 percent of the crop has been lost due to a freeze that occurred during the budding season.

LEMONS

Market is steady to strong and will continue to strengthen as we slow down out of Dist. 1 and depend more on Dist. 2 for supplies. The fruit out of Dist. 2 is fairly high in maturity, but not near as mature as last year so we should be in better shape going through the summer, but do expect prices to start inching up going forward as we go into the spring and summer months. The overall quality is good to fair with some of the Dist. 1 fruit showing some high maturity and little soft. Sugar levels range from 6 to 8 Brix.

LIMES

The market is extremely elevated. Expect tight supplies, especially 110- to 200-count sizes, through April. Quality is good, but brown spotting and scarring are occasional problems.

NAPA

Demand exceeds supply for growers in Central California.

ONIONS

Crossings out of Mexico have been steady and we are finally seeing the effect. Most all retailers have made the move to new crop and with that; Idaho, Oregon and Washington have lost their marketing edge. FOB prices on old crop yellows are down across the board, jumbo reds went up. We are about 10-12 days away from moving out of Idaho and into Texas. Receivers should be keeping their inventories very tight so they can make the switch to new crop as soon as it's available. Caution Opco's about buying in any extra inventory out of Idaho, as most likely it will not work out well.



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ORANGES

Market very strong as we are into more of the late navel varieties which are peaking on 56's and 72's, therefore 88's and smaller are very tight and strong and will continue to keep that way until we start some Valencia's in a couple of weeks. The overall quality of the navels is very good with excellent color, strength and eating quality. We will continue to pack navels through first of May and possibly longer, depending on demand. The Valencia's are looking good and sugar content is higher than we typically are seeing at this time of year, so expect a good eating piece of fruit with great juice content.

PARSLEY (CURLY)

Plentiful supplies in both Salinas Valley and Mexicali. Quality is very nice with lengths measuring 8-10 inches with dark green color.

PARSLEY (ITALIAN)

Lighter supplies this week with finishing in Mexico and the start of Salinas Valley. Quality is nice with bunches averaging 8-10" in length with dark green color. Lighter supplies industry wide is causing the market to advance.

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)

Not much market activity this week on the main sizes 60oct-100oct. With the steady departure of the Norkotah we are seeing the 40's and 50's strengthening just a little. Availability on both 10oz and 6oz 2's are good and this trend will continue for the balance of the month. Many sheds have had to adjust their run schedules and cut back on some production due to excess consumers. Right now, Idaho seems to have plenty of retail packs and the extra supply is slowing down production which gives each shed the opportunity to move its excess. This should not affect the FOB prices of cartons. The market for the month of April should remain pretty constant.

RASPBERRIES

Holiday demand will push up the market through April; stocks will tighten. Quality is very good, yet bleeding is a slight problem. Sugar levels are high, ranging from 13 to 14 Brix.

RED CABBAGE

Red cabbage supplies and market should remain steady for another week. Demand remains very light.

ROMAINE LETTUCE

Prices are starting to climb. This week's rain and cooler temperatures may slow growth and cause mildew problems in Huron and Salinas. The Yuma season ends this week. Quality is very good: harvesting crews are trimming damaged leaves.

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 availability for late-week shipments; hail damage will be present, caused by storm activity in Central California early in the week.

SPINACH (BUNCHED)

Strong demand with stronger market conditions Overall quality is excellent with large full bunches, very dark green color and 10-11" in length. Carton weights are 20-22 lbs. The potential of mildew in fields exists with rain in Salinas.

SPRING MIX

Prices are unchanged. Quality is very good, however arugula supplies remain limited; yellowing and short shelf-life are issues. This week's poor weather may cause mildew problems.

SQUASH (GREEN)

East: Supplies are still tight due to a gap situation with generally steady FOB prices. Large product is in extremely short supply. The cause for this has been explained in previous Market Reports. Quality good.

West: Supplies still tight. Little wire-bound available. FOB prices steady. Quality variable between growers but good quality can be found.

SQUASH (YELLOW)

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

West: Demand outstripping supplies because the East is having to go to MX to meet all of its needs, which is putting upward pressure on FOB prices. Quality variable between growers but good quality can be found.

STRAWBERRIES

Prices dropped last week, but because more rain is forecasted, the market is expected to rise later this week. California growers are mainly harvesting in Oxnard and Santa Maria. Fruit is sweet: sugar levels range from 14 to 15 Brix.



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TOMATOES

EAST

Rounds: The weather has been perfect for growing tomatoes with highs in the 80's and lows in the 60's. This is bringing the Immokalee spring crop along more quickly than first expected and should be ready to start harvesting in the next 5-7 days. Ruskin is expected to start harvesting its crop on the 15th. This will increase volume considerably which will put downward pressure on FOB prices. For next week, however, the market remains unchanged with ex-large tomatoes in very short supply. Quality is variable with some growers but generally continue to be very good to excellent.

Romas: FOB prices are up again this week on all sizes. Quality remains very good.

Grapes: Grape supplies have improved and FOB prices are down slightly on the 12/1 pts. We look for supplies to continue to improve putting downward pressure on FOB prices. Quality remains very good.

Cherries: Supplies improved. FOB prices down. Quality is good.

WEST/MEXICO

Rounds: Supplies have increased putting slight downward pressure on all sizes. Crossings continue at Nogales and McAllen. Because of the excessive heat this season, the mature green market is ahead of schedule and volume will be decreasing sooner than normal this season. The vine ripe volume should continue close to normal. The supplies of mature greens continue to be so tight that no market report is available. The quality of the mature greens is good. Quality of vine ripers is variable.

Romas: Nogales and McAllen crossings continue. FOB prices have moved up slightly this week. Quality is variable from shipper to shipper.

Grapes: FOB prices are lower due to better supplies. 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 remain elevated. Volume has been low for the entire Chilean season due to freezing temperatures last December. The market will stay high until the California season begins in late May/early June. Quality is good: sugar levels are low.

WATERMELON

The market is easing; stocks are becoming more plentiful in Mexico (into Nogales and South Texas), as well as from offshore (Guatemala and Honduras into California and Florida). Melons are sweet; sugar levels range from 12 to 14 Brix.