

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending April 25, 2014

MARKET OVERVIEW

Demand for most leaf items has improved, including supplies. Prices are steady and quality is very good. Bunched spinach continues to show damage from the hail storm in Central California that occurred two weeks ago. Cauliflower has significantly increased in price over last week. The extreme market situation continues for Mexican lime growers although there has been some relief in availability and to some extent pricing; 230s/250s now under \$100.00. The upcoming Easter holiday has created strong demand for various items, including asparagus, strawberries, green onions, and avocados.

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



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APPLES & PEARS

Demand and movement remain steady on both apples and pears. Lower grades are in tight supply 113s 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). Storages are running low and some shippers are winding down on a few of their varieties. Import Galas and Bartlett's are available on the East Coast. Washington Bosc pears are rapidly winding down, with D'anjous running thru May. Size structure remains heavier to 80 & larger, very few fancy grade. Hood River will ship into June, peaking on 90 and larger. Sugar levels range from 12 to 14 Brix.

ARTICHOKES

Production is sharply declining from several weeks ago; fair supplies and projected lighter for next week. A wide variance in sizes exists. Expect to see sizing transitioning from heavy numbers (12s – 24s) to more mediums (30s-48s) with great deals for volume orders. Expect to see improved volume on 12 and 18 in approximately four weeks when the new crop season begins.

ARUGULA

Good availability in Central California.

ASPARAGUS

Strong demand continues to support current prices. California is the primary district. Prices have stabilized. California new crop stocks are sufficient; weather is ideal for growth. Expect the market to ease next week.

AVOCADOS

The market remains elevated. California new crop stocks have begun increasing; small sizes are most plentiful. Mexican volume is average, but the season is winding down. Oil content is high and flavor is nutty.

BELL PEPPERS

Green:

East: Generally steady demand and supplies. FOB prices are down slightly. We are seeing some quality issues due to the rain, mainly in the form of side wall decay.

West: No large pepper available. Prices generally steady on the smaller sizes. Quality is more suspect as we come to the very end of the crop.

Red and Yellow: Red bells are extremely short due to the fact that growers picked the red while they were still green to meet the demand of green pepper the past

several weeks. This shortage of red pepper will continue for a couple of weeks. Mexican prices will continue to inch up until new crop harvesting starts in California in mid-May. Quality is very good: flavor is sweet, yet zesty.

BLACKBERRIES

Continued improvement in availability for conventional blackberries from Central Mexico, with light harvests beginning in California. The harvest transition out of Mexico back to California is continues and prices have stabilized. Quality is good: light mold and bleeding are minor issues. Sugar levels measure 12 to 13 Brix.

BLUEBERRIES

Blueberry harvest transitions are back to domestic harvests in Florida and California. Blueberries are starting to loosen from all U.S. grower-shippers for the week. Mexico has provided an important transition point now in mostly 12 x 6 oz. clamshells. Larger packs will be back in late April when U.S. production increases. Prices have reached a seasonal high. Quality is very good: berries are slightly floral and sweet. Sugar levels are high, ranging from 14 to 18 Brix.

BROCCOLI

Volume continues to fluctuate; currently approximately 15% below average. The following two weeks are projected to be in line with demand. Broccoli is showing good green color, uniform dome shape with occasional branchy appearance but overall a good pack. Industry wide, shippers appear to be ahead of harvest schedule so there is a potential for larger gap in the coming weeks. Expect the market to remain active for the balance of April due to better demand.

CANTALOUPE

Good supplies of fruit on both coasts with heavier supplies on the east coast, the overall quality of the fruit is excellent with good internal and external color and excellent sugars. Expect the market to keep steady and we should start some California/Arizona desert fruit around the first of May and looking like some excellent quality to start out of the desert areas. We will see some larger fruit to start out and then get into some smaller fruit around the second week of May. Quality is very good: texture is firm, yet juicy. 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.



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CAULIFLOWER

Overall supplies are expected to decrease toward the end of April. Currently, quality is nice with creamy to off white curds. Prices are extreme.

CELERY

Good supplies in Oxnard. Demand has increased. Prices are steady to higher. Quality is good with medium green color, good meaty shanks but seeders have started to appear in both U.S. and Mexican celery. Carton weights range from 57-59 lbs.

CILANTRO

Plentiful supplies. Quality is excellent with 9-11" length with good green color. Prices remain steady.

CUCUMBERS

East: Continue harvesting FL crop. FOB prices weaker. Quality very good.

West: Quality is extremely variable from grower to grower with pricing reflecting the quality. Crop is close to the end.

FENNEL/ANISE

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

FRISEE

Good supplies.

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 move. Production is expected to reach full capacity. Sizes remain best on 36s smaller for volume. External and internal color are very good.

GRAPES

Market steady and strong with very few crimsons arriving as we have past the April 10th date which states anything that arrives after April 10th must make US #1 upon arrival, so we are seeing a few containers of crimsons with the last ones arriving around May 4th which will probably overlap with Mexico and Coachella valley fruit. We expect to start California and Mexico around the first week of May and then should see steady volume out of both regions by the second week of May. This is an earlier than normal start which should be good for all districts an overall fruit quality should be excellent as we

have had a very mild winter. Green seedless sugar levels range from 17 to 18 Brix; red seedless sugars range from 22 to 24 Brix.

GREEN BEANS

Good availability in Florida. Adequate supplies in the Coachella Valley of California. Nogales will be finished next week.

GREEN CABBAGE

California central coast has begun. Green cabbage has a very nice size and color but volume is slightly lower and will remain so for the next few weeks.

GREEN ONIONS

Good volume is expected over the next several weeks. Quality and appearance continues to be nice. Mediums continue to dominate followed by pencils and only a small amount of larges. Prices are slightly higher from last week.

HONEYDEW

Market is steady to soft as there is good supplies on both coasts and fruit is of excellent quality and good color and sugar as well. Expect market to keep steady and we expect to get started out of the California and Arizona desert around the second week of May. Again quality looks to be very good with our mild winter. Sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Salinas Valley production has increased. Demand has improved and prices are steady. Quality is only fairly good with medium to medium plus head size, fairly good color with carton weights at 42-46 lbs.

JALAPEÑOS

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

West: Good supplies continue. Quality is good. Note: Poblanos are in extremely short supply with FOB prices in the low \$30 range.

KALE (GREEN)

Very good supplies this week. 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.



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LEMONS

Market strong and strengthening as we near the end of Dist. 1 and rely on Dist. 2 to satisfy demand, we will see the market continue to strengthen each week going into the summer months until we see some Chilean arrivals around the mid part of June. The overall quality is good to fair with some higher maturity lots, but for the most part nice firm good colored fruit. We have a normal volume crop out of Dist. 2 and should not run into anything like last year's situation. Sugar levels range from 6 to 8 Brix.

LETTUCE (GREEN AND RED LEAF)

Steady volume for the next few weeks. Red and green leaf should be 25- 26 lbs. per case and 9-11" in length. Ideal weather in Salinas Valley. Quality is very nice.

LIMES

Lime prices have reached 85.50 FOB (if available); LA market is over \$100.00. There has been some relief in availability and to some extent pricing; 230s/250s now under \$100.00.

NAPA

Tight supplies for growers in Central California.

ONIONS

We have begun our Texas crop this week that ships out of Raymondville, Texas. Of the quotes coming out of the Texas region, about 80% of the quotes are for Mexican grown onions with the balance being domestic. Next week it will be about 60/40, and the week after that it will change to 80% Texas and only 20% import. The Texas onions have been very nice so far this year but it appears that the overall crop may lack some size. The majority of the onions coming in are more in line with mediums making Super Colossal and Colossal very short in supply. Eagle Eye will start in southern California next Monday. This will give us two growing areas to utilize over the next month or two before we open with New Mexican product around June 1st. Overall the Texas FOBs are down on all yellows and reds in order to compete with the imported product.

ORANGES

Market very strong with good demand on all sizes of navels and very limited supplies of 113's and smaller as our later varieties are peaking on 56's and 72's. The overall quality of the fruit is very good with excellent color and sugar and mostly firm although we are starting to see some warmer weather which might cause some fruit top soften up, but overall excellent quality. We expect to start

some Valencia's next week, which will help with the 113's and 138's supply. The Valencia's have excellent color and good sugar for this time of year, but do not eat as well as the navels. Fruit is juicy; sugar levels range from 11 to 12 Brix.

PARSLEY (CURLY)

Continued plentiful supplies this week. Quality is nice with lengths measuring 8-10 inches with dark green color.

PARSLEY (ITALIAN)

Lighter supplies industry wide. Quality is very nice with bunches averaging 8-10" in length with dark green color. Market prices are up considerably due to the lack of available product.

PINEAPPLE

Currently, 5s and 7s are the tight sizes with better availability on 6s and 8s. Flavor is sweet: sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

The market is strengthening in Idaho with most the pressure coming on 70cts and larger. There has been a shortage this week of large potatoes mostly 40's, 50's and 60cts. Some of this can be attributed to Easter ad business run by national retailers. Sheds have had to shift to some smaller lots to satisfy their retail commitments. The general feeling in Idaho is that FOB prices will start moving upward in the next couple weeks and should stay a little bullish through the spring. Unlike last year, it appears as though Wisconsin and Colorado will have enough supply to avoid any supply gaps. This will also help control FOB costs as we won't see receivers ordering heavier out of Idaho as a result of weak supplies outside the state.

RASPBERRIES

Raspberry harvests continue in Central Mexico. Oxnard growers report higher yields coming back to California. Raspberry fruit quality continues to be very good. Prices have stabilized and will likely decrease in the next few weeks. Bleeding is a slight problem. Sugar levels are high, ranging from 13 to 14 Brix.

RED CABBAGE

Supplies are light and sporadic. Sizing is smaller by product is clean. The market will remain strong until Salinas production starts at the end of April.

ROMAINE HEARTS

Average supplies. Romaine hearts are excellent this week with great weight, color and length. Market is steady.



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ROMAINE LETTUCE

Ideal weather in Salinas; color is terrific with excellent weights (37- 38 lbs.) and lengths (11- 12") although very light but occasional fringe burn. Good supplies are expected through next week.

SNOW AND SUGAR SNAP PEAS

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

SPINACH (BABY)

Good availability.

SPINACH (BUNCHED)

Lower volume this week due to the hail storm from few weeks past. Quality is only fair with some bruising and holes in the leaves. Lengths are 9-11 inches with medium green color and case weights of 20 lbs. Demand is strong.

SPRING MIX

Good supplies for new crop production in Central California (Hollister, San Juan Bautista, Watsonville).

SQUASH (GREEN)

East: Plant City continues to harvest which is improving the supply and putting downward pressure on FOB prices. Large product is no longer in short supply with supplies improving daily. Quality is improving.

West: Quality variable between growers but good quality can be found. Downward pressure on FOB prices. Product should continue to cross through Nogales for another 3-4 weeks.

SQUASH (YELLOW)

East: Prices are down slightly due to a small increase in supplies. Harvesting has moved mostly to the Plant City area.

West: Volume should continue to slightly increase. Quality variable between growers but good quality can be found. Crossings should continue at Nogales for another 3 to 4 weeks.

STRAWBERRIES

With Mexico harvests diminishing in warmer daily temperatures, strawberry harvests have shifted to Oxnard and Santa Maria as the primary producing districts. Watsonville and Salinas strawberry harvests have picked up significantly, strawberry orders can be placed in Northern California with raspberries alongside. Driscoll quality remains best of all in the strawberry market.

Berries are sweet: sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: FOB prices continue to fall this week. They have fallen on all sizes. As we get into the crown picking of the new crops in the Ruskin/Palmetto area, large sizes will become more plentiful and the smaller sizes will get tighter. In addition, Nogales continues at suspension agreement minimums. Quality continues to be generally very good to excellent.

Romas: FOB prices are down again this week. Supplies have not increased as much as the rounds; however, Nogales continues to drive the roma market downward. Quality remains very good.

Grapes: Grape supplies continue strong as FOB prices are up slightly on the 12/1 pts and down slightly on the 20# bulk. Quality remains very good.

Cherries: Supplies improved. FOB prices down slightly again this week. Quality is good.

WEST/MEXICO

Rounds: Supplies have increased putting downward pressure on all sizes. Crossings continue at Nogales and McAllen. Crossings at San Diego have also begun. Prices on the vine ripers remain at the minimum or within \$.50 of the minimum. The supplies of mature greens continue to be extremely tight and no market report is available. No Ex-large mature greens are available as the end of the crop nears. Quality of the mature greens is very good as the quality of vine ripers is variable.

Romas: Nogales and McAllen crossings continue and San Diego has begun. FOB prices remain at suspension agreement minimums. Quality is extremely variable from shipper to shipper due to puffiness which is due to the excessive heat the region has experienced.

Grapes: FOB prices are variable and quality is generally fair at best. Most suppliers are going east due to quality concerns in the west.

Cherries: No market is quoted. Supplies are still limited. Quality is suspect. West continues to pull from the East to meet demand.

TREE FRUIT

The Chilean season is winding down, with limited availability on large sized peaches and black plums currently available. New crop California apricots, nectarines and peaches are available. Limited availability,



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California cherries are expected by late April. Expect an elevated market until the California season begins in May. Quality is good: sugar levels are low.

WATERMELON

Steady availability for the spring harvest in Northern Mexico. Prices are expected to rise next week, with strong retail demand for the Cinco de Mayo holiday. Fruit is sweet: sugar levels range from 12 to 14 Brix.