

FRESH DIRECTIONS

WEST CREEK FRESH



Weekly Produce Trend Report for Week Ending May 2, 2014

MARKET OVERVIEW

Supplies and prices of most leaf items remain steady. Growing conditions for romaine, romaine hearts, and bunches of spinach is ideal resulting in excellent product. 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. Idaho Potato Market is a little active and showing some signs of strengthening.

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-California	High	Good	↑
Avocados-Mexican	High	Excellent	↑
Blueberries	High	Good	↑
Raspberries	High	Very Good	↑
Strawberries, Broccoli	Low to Moderate	Good to Very Good	↓
Grapefruit, Romaine Lettuce, Romaine Hearts, Green & Red Cabbage	Moderate	Excellent	↔
Limes	Extreme	Good	↑↑
Iceberg Lettuce, Frisee	Moderate	Fair	↔
Blackberries, Pineapples	Moderate	Good	↔
Green & Red Leaf Lettuces, Cantaloupes	Moderate	Good	↔
Artichokes	Low to Moderate	Excellent	↓
Cauliflower	High	Fair	↑
Spinach (Bunched)	Moderate to High	Excellent	↑
Fennel/Anise, Asparagus, Peeled Garlic, Mache, Napa, Parsley (Italian)	High	Good	↑
Arugula, Bok Choy, Carrots, Celery, Cilantro, Parsley (Curly), Zucchini, Snow & Sugar Snap Peas, Baby Spinach, Spring Mix, Yellow Squash, Red & Golden Delicious, Bosc Pears	Moderate	Good	↔
Cucumbers, Green Onions, Round, Roma, Plum, Cherry, & Grape Tomatoes, Honeydews, Kale (Green)	Low	Good	↓
Potatoes	Moderate	Good	↔
Lemons, Oranges, Navels, Valencias, Green & Red Seedless Grapes, Green Beans, Red & Green 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 of 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 through May. Size structure remains heavier to 80 and larger, very few fancy grade. Hood River will ship into June, peaking on 90 lgr.

ARTICHOKES

With conclusion of the 2013 crop and beginning of the 2014 new crop, short supplies are expected for the next several weeks, especially sizes 18-24. There is better availability on the extra large group (size 12s) from new sources as the old crop comes to an end. There are fairly good numbers on 30s and smaller. Small to medium categories are priced moderately.

ARUGULA

Good availability in Central California.

ASPARAGUS

Strong demand continues to support current prices. California is the primary district.

AVOCADOS

Demand is strong and prices are on the rise with the approach of Cinco de Mayo. Harvest activity in Mexico is on the decline this week, causing additional pressure on supplies for Cinco de Mayo. Oil content is high and flavor is nutty.

BELL PEPPERS

A wide range in quality and price exists for Green Bells, with premium prices for Florida and California growers, and Mexican growers priced at a discount. Continued tight availability for Red Bell peppers in the West.

East: Bells are the hot produce item this week due to the rains last week. Supplies are short. FOB prices are up. We are seeing some quality issues due to the rain, mainly in the form of side wall decay. Red bells also continue to be in short supply.

West: Nogales crossings are winding down. No large pepper available from those growing regions. Quality is more suspect as we come to the very end of the crop.

BLACKBERRIES

Continued improvement in availability for conventional blackberries from Central Mexico, with light harvests just starting in Northern California. The harvest transition out of Mexico back to California continues and prices have stabilized. Quality remains good. 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. Mexico has provided an important transition point now in mostly 12 x 6 oz. clam shells. Larger packs will return by the first week of May when U.S. production increases. Prices have reached a seasonal high. Look for prices to drop somewhat with more harvest volume. Quality is very good: berries are slightly floral and sweet. Sugar levels are elevated, ranging from 14 to 18 Brix.

BOK CHOY

Steady availability.

BROCCOLI

Supplies are approximately 15-20% below average. This industry trend should continue for the next few weeks for broccoli shippers in Salinas and Santa Maria; most likely a larger gap potential in the coming weeks. Markets are expected to remain active through month end. Quality remains consistent for this time of year; occasional branchy appearance but overall good quality with even bead, dome shape and solid green color.

CANTALOUPE

Market steady with good supplies on the East coast and lighter supplies on the west coast. The overall quality of the fruit is excellent with a very clean tight net and excellent color and sugar internally, and mostly straw to green cast. Expect the market to keep steady on the offshore fruit. We will get started on California and Arizona fruit possibly by this weekend, but better supplies and quality around the first of May out of the California and Arizona deserts. We anticipate a good crop out the Arizona/California deal as the weather has been ideal and vines are looking strong and vigorous. We will be in the desert through the end of June and then transition to the Westside around the first of July. 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, TX.

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CAULIFLOWER

Overall supplies are expected to decrease toward the end of April. Currently, quality is fairly good, medium heads, off white in color and slight soft green jacket. Very high prices continue.

CELERY

Adequate supplies with good demand. Prices are steady. Quality is good with dark green color, good meaty shanks but seeders are beginning to show. Case 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 currently steady with slight upward pressure. Quality very good.

West: Quality is extremely variable from grower to grower with pricing reflecting the quality. Crop is close to the end. Volume is increasing in Baja, Mexico; stocks from Central Mexico remain adequate.

FENNEL/ANISE

The ongoing shortage has begun to ease; better availability and lower prices are expected next week.

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 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.

GRAPES

Market is steady on reds and very strong on greens, expect greens to stay very strong as there are no more arrivals and the red market to keep steady as there are a few more containers scheduled to arrive between now and May 5th on both coasts. We will start Mexico and Coachella flames and Perlettes around the first of May, which is about 2 weeks earlier than normal and then we should hit very good volumes out of both areas by May

19th and have good supplies through the first of July and then start here in the Central Valley around the first of July. The overall crop looks very good with the Coachella fruit extremely nice quality, and a range of quality out of Mexico. Sugar levels range from 17 to 18 Brix for both colors.

GREEN BEANS

Strong demand for Florida growers, with limited availability in the West; Nogales is finished and Coachella is winding down.

GREEN CABBAGE

The market will remain steady during the transition period into the California Central Coast region. Counts and weights on green cabbage have been 20-22 lbs. per carton with 50 lbs. or more in carton weight.

GREEN ONIONS

Continued plentiful supplies this week. Mediums continue to be dominate (75% of volume), following are pencils and few larges. Continued good numbers coming out of Mexico and market remains depressed.

HONEYDEW

Market steady with good supplies crossing from Mexico, the overall quality is very good with a nice clean green to cream exterior and excellent internal color and sugar. We expect to start some California fruit around May 5th and supplies from Mexico will continue to cross as well. Expect good steady supplies going forward as we pick up volume in California and Mexico through May and June and then transition to the Westside. Sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Quality is fair with weights ranging from 38-46 lbs, depending on block and variety. Color is paler due to outer leaves of heads being peeled off for occasional mildew.

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 is very strong with good demand on all sizes, especially on the 140's and smaller as we are peaking on some larger fruit now but, will get back to a more balanced pack out in the next 2 weeks. The overall quality of the fruit is very good with excellent shape and good juice content. There are a few blocks that are a little more mature, showing some bronze color, but that is limited and we may run into that more as we approach the first of August, depending on weather. We do not anticipate having a shortage like we went through last year as all regions are earlier than normal this year due to our mild winter. 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

Although prices are extremely high, they are finally starting to ease, especially for small sizes. Expect limited supplies through May. Quality is average, yet brown spotting and scarring are problems.

NAPA

Tight supplies for growers in Central California.

ONIONS

The market has settled down. Mexican supplies (into South Texas) are ample. The Northwest season is ending. California growers have started light harvesting.

ORANGES

Market steady and strong with excellent demand and overall very good quality on navels. The color and sugar is excellent and the fruit is very strong as our weather has been very mild and expecting another cool down which will help keep the rind tight and strong. We have started Valencia's in a light way and overall quality of the fruit is very good with tight rind and excellent juice content, the sugar is not as good as the navels as the navels eat like candy. Expect to have good supplies of Valencia's through the summer we might see things get fairly strong around the end of August as most will want to get the fruit off of the tree and help eliminate some of the stress on the tree as we will have limited water and will hope for an early wet year next year, to keep the tree and next year's crop healthy. Fruit is juicy; sugar levels range from 11 to 12 Brix.

PARSLEY (CURLY)

Continued plentiful supplies for the next several weeks. Quality is nice with lengths measuring 8-10 inches with dark green color.

PARSLEY (ITALIAN)

Extremely light supplies this week. Quality is very nice with bunches averaging 8- 10" in length with dark green color. Market prices continue to rise as availability is tight throughout the industry.

PINEAPPLE

Prices are steady to slightly higher than last week. Supplies remain extremely limited; size flexibility is critical for order coverage. Flavor is sweet: sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Market appears to strengthen as count cartons are tighter at this time. No significant jumps, but the FOB's are slightly higher. Suggest orders are placed earlier than usual to ensure timely arrivals and slightly lower delivered pricing. Transportation is not an issue at this time.

RASPBERRIES

Raspberry harvests now starting to decline in Central Mexico. Meanwhile, Oxnard growers report higher yields coming back to California. Raspberry fruit quality continues to be very good. Sugar levels are high, ranging from 13 to 14 Brix.

RED CABBAGE

Light supplies and smaller sizing continues. The market will remain strong until Salinas' production starts at the end of April.

ROMAINE HEARTS

Steady supplies with ideal growing conditions resulting in excellent product. Color is light green with good cupping and uniform size.

ROMAINE LETTUCE

Supplies and quality are both very good with ideal growing conditions. Demand is good. Color is dark green, lengths 11-12 inches and weights are 35-37 lbs.

SNOW AND SUGAR SNAP PEAS

Prices are strengthening as the season winds down in Guatemala and Mexico. Salinas and Santa Maria are now the primary California districts for snap peas; Santa Maria for Snow peas.

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SPINACH (BABY)

Good availability.

SPINACH (BUNCHED)

Overall market has reached its peak as more acreage and very high yields come forth. Case weights are 20-22 lbs. and feature large full bunches with 9-11 inches in length and dark green coloring. Strong yield and excellent quality.

SPRING MIX

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

SQUASH (GREEN)

East: Plant City continues to harvest. Prices are steady. Quality is good.

West: Quality variable between growers but good quality can be found. FOB prices steady. Product should continue to cross through Nogales for another 2-3 weeks.

SQUASH (YELLOW)

East: Prices are generally steady as supplies remain short. Quality is only fair due to winds (scarring) and rain. Harvesting has moved mostly to the Plant City area.

West: Volume continues strong with steady FOB prices. Quality variable between growers but good quality can be found. Crossings should continue at Nogales for a couple more weeks.

STRAWBERRIES

The California market is slightly higher than last week. Quality is best in Santa Maria and Salinas/Watsonville; Oxnard quality is poor. Berries are sweet: sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: FOB prices continue to fall this week. Prices have fallen on all sizes. Immokalee is winding down and this will be the last week for any appreciable volume. The Ruskin/Palmetto area has begun to harvest but will not be in full production until sometime next week. We look for the supply of larger tomatoes to increase and the supply of the smaller tomatoes to decrease. This will probably result in a level market next week on all sizes. Quality continues to be generally very good to excellent.

Romas: FOB prices are down slightly 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 steady on the 12/1 pts and up slightly on the 20# bulk. Quality remains very good.

Cherries: Supplies still good. FOB prices have bounced slightly off the bottom and are up around \$1. Quality continues good.

WEST/MEXICO

Rounds: Vine Ripes continue at the Suspension Agreement minimums. Crossings continue at Nogales but harvest in this area of Mexico is ending. Crossings at San Diego have begun but are very light. The supplies of mature greens continue to be extremely tight and no market report is available. Ex-large VR's are no longer available out of Nogales. Quality is generally fair to poor.

Romas: Nogales and McAllen crossings continue and San Diego has begun with more volume than rounds. FOB prices remain at suspension agreement minimums. Quality is extremely variable from shipper to shipper.

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 has ended. New crop harvesting has begun in California; nectarine, peach, and plum supplies are limited. Quality is fair: sugar levels are low (normal for this time of the season).

WATERMELON

Very good supplies out of Mexico and market has eased a bit and the overall quality is excellent with excellent internal sugar and fruit strength. We expect to get started out of the Central Valley around mid-June and if weather conditions stay consistent we should have some excellent quality fruit.