

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending May 9, 2014

## MARKET OVERVIEW

Supplies are on the shorter side for most leaf items and prices remain steady. Growing conditions for romaine, romaine hearts, and bunched spinach are ideal, resulting in excellent product. Limes continue to decrease in price from the extended extreme market situation that occurred for the last several months. Growers are assessing any potential damage from three days of near-record high temperatures in Central and Southern California this week. The most immediate effects have been seen in the strawberry harvest, where harvesting has been curtailed due to high temperatures in the field. Growers will have better evaluation later this week of any potential heat damage to row crop vegetable items in Salinas and Santa Maria.

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



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## APPLES

Prices are steady, but demand for small sizes remains strong; large-size fruit is most abundant. Sugar levels measure 12 to 14 Brix (sugar to acid ratio).

## ARTICHOKES

Very light supplies available this week and for the next several weeks. As many items, artichokes have been harvested ahead of schedule thus creating a gap. There continues to be a wide variation in available sizing as the older crop concludes and new crop slowly begins. Mostly medium and smaller sizes from last season's crop but new crop should be heavier towards the extra-large sized 12s with improved volume on 18s and 24s for mid-May. Quality is very good on the new crop with consistent shape and sizing, firm compact heads and good color.

## ARUGULA

Good availability in Central California.

## ASPARAGUS

Strong demand continues to support current prices. California is the primary district. The harvest in Eastern Washington is now underway.

## AVOCADOS

Demand is strong and prices are on the rise with the approach Cinco de Mayo. Harvest activity in Mexico is on the decline this week, causing additional pressure on supplies for Cinco de Mayo. Large-size No. 2 grade fruit is limited. Oil content is high and flavor is nutty.

## BELL PEPPERS

This is the last month for Mexican production; prices will rise until the California season starts in mid-May. Quality is very good: flavor is sweet, yet zesty.

**East:** FOB market of bells continues to be strong. The supply of choice is tight while demand is strong. Quality continues to be suspect due to rain. Red bells also continue to be in short supply.

**West:** Nogales crossings are nearly at the end. No large pepper available from those growing regions. Quality continues to be suspect as we come to the very end of the crop.

## BLACKBERRIES

Harvests are primarily 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.

## BLUEBERRIES

Blueberry harvest transitions are back to domestic harvests in Florida and California. Blueberries harvest volume has improved. Mexico has provided an important transition point now in mostly 12 x 6oz. clamshells. Larger packs will be back by early May as U.S. production increases. Prices have reached a seasonal high, look for prices to drop somewhat with more harvest volume.

## BOK CHOY

Steady availability.

## BROCCOLI

Supplies meet with demand this week. For the coming weeks, supplies are projected to be 15-20% down. This industry trend should continue for most broccoli shippers in Salinas and Santa Maria; most likely a larger gap potential starting next week. 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. Bunch sizing is ranging from 2-3 per on 14s.

## CANTALOUPE

Market steady to good with supplies of offshore fruit on both coasts, with more reasonably priced fruit on the east coast. The overall quality is excellent with a nice clean net and excellent internal color and sugar. We have started California and Arizona fruit, and will be in better volume by the week's end. The first of California fruit looks very good and we expect good supplies out of the desert going forward. Quality is very good: 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

Lighter supplies this week; only covering contracts. Less demand and pricing has increased. More product is expected next week. Quality is fair, from cream to off white curds, medium size and weights 26-32 lbs. on 12s, depending on shipper and field location.

## CELERY

Good supplies available in Oxnard this week with weights in the upper 50s. Quality is also good although seeders are beginning to show. Great growing conditions are resulting in great quality. Next week supplies are projected to be lighter and sizing much smaller; short term issue. Salinas' celery will start in June. Prices should be steady to higher.





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## CILANTRO

Continued strong supplies this week. Quality is very good with 9 -11" in length with good green color. Prices remain steady.

## CUCUMBERS

**East:** Continue harvesting FL crop. Demand is strong. FOB prices are stronger. 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

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

## FRISSE

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 very strong on greens and stable on reds as green supply is limited on the Chilean fruit due to only storage fruit available that is shippable. There will continue to be containers arriving from Chile through mid-May. The overall quality of the reds is good with nice color and fairly good sugars. We have started on some perletes and flames out of the California desert, and Mexico and will be ramping up volume this week. By the middle part of May we will be in full swing with very good volume out of both regions. The summer is approaching and it is starting time to push California fruit. Sugar levels range from 17 to 18 Brix for both colors.

## GREEN BEANS

Demand exceeds supply in the West; the Coachella harvest has finished, with the Central San Joaquin Valley deal not starting until mid-May. Prices have also advanced in Florida in response to the current supply situation.

## GREEN CABBAGE

Volumes are increasing for central coast green cabbage as there is an overlap with Santa Maria and Salinas growing regions. Weights are well above 50 lbs. and head counts of 18-20 per carton. Product is in great condition. East coast is seeing good quality out of Georgia right now.

## GREEN ONIONS

Plentiful supplies this week with nice quality. Medium sizes continue to dominate, followed by pencils and only a few larges.

## HONEYDEW

The market is steady with good supplies coming out of Mexico. The overall quality looks very good with green to cream cast and excellent sugar and fruit strength. We expect to get started out of California and Arizona towards the weekend and then see steady volumes of fruit going forward. The California and Arizona fruit looks excellent, and we are expecting a very good year as far as quality is concerned. Sugar levels range from 11 to 13 Brix.

## ICEBERG LETTUCE

Light supplies available in Salinas this week and demand is good. 30s are limited. Quality is fair to good, depending on variety with misshapen heads and ribby appearance showing in many packs. Overall weights are 38-46 lbs. Head size range from medium to medium plus, with good color. Prices are expected to be steady to higher this week.

## JALAPEÑOS

**East:** Supplies available but most suppliers are pulling from the west due to quality and pricing factors.

**West:** Supplies have increased but maybe not to the point to meet all of the Cinco de Mayo demand at the current price, which is causing the expectation of higher prices this week. Quality is very good.

## KALE (GREEN)

Very good supplies this week in Salinas Valley. Overall quality and appearance is nice with bunches and lengths measuring 10-12" and dark green color. Market prices are down from last week.

## KIWI

New crop from Chili is now available; supplies are tight. 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 very strong on all sizes and will continue to strengthen as we progress through the summer. The overall quality is good with some higher maturity showing up in some blocks, but overall good juice content and color. We will see some of the Chilean fruit start to arrive around the middle part of June which should help stabilize prices. We expect to start about 2-3 weeks earlier than normal out of Dist. 3 so possibility of seeing fruit around the third week of August, which will really help us on the supply side and hopefully keep steady volume through the year. Sugar levels range from 6 to 8 Brix.

## LETTUCE (GREEN AND RED LEAF)

Very short supplies of green leaf this week and the next few weeks as well. There are some issues with fringe burn in the fields; an occasional 2-3 heads per case with some light fringe burn. Each case will be 24- 25 lbs.

## LIMES

The market is inching down, especially for small sizes. New crop harvesting has started, but growers are stripping trees of fruit that would normally be picked in late May/June. Quality is good, yet brown spotting and scarring are problems.

## NAPA

Tight supplies for growers in Central California.

## ONIONS

Market is mostly steady, but is expected to further ease up in the coming weeks. The Imperial Valley in Southern California continues to ramp up their supply and will have good supply on all three colors next week. Supplies remain heavy to a smaller size profile in Texas that is peaking on Medium Yellows, with very few Super Colossal Yellow Onions available. Additionally, Vidalia onions have started shipping out of Georgia which is curbing retail demand on round onions from other shipping areas. Trucks are an issue from both the Imperial Valley in California, as well as the Texas Valley.

## ORANGES

Market very strong with good demand on navels. Fruit is eating excellent and holding up very good with a nice tight rind and excellent juice content. We have started a few Valencias and overall quality is very good as well, just not as sweet but eating fairly good. We will continue navels through the middle part of May and then be into all Valencias going through the summer. Expect prices to stay steady on Valencias and strengthen on late navels. Sugar levels range from 11 to 12 Brix.

## PARSLEY (CURLY)

Continued plentiful supplies for the next several weeks. Quality is very good with lengths measuring 8-10 inches with dark green color. Market prices are steady.

## PARSLEY (ITALIAN)

Better supplies than last week. Quality is nice with bunches averaging 8-10" in length with dark green color. Demand continues to exceed supply throughout the industry, and market prices continue to climb.

## PINEAPPLES

The market is unchanged. Stocks will remain low for another week or so; size flexibility is critical for order coverage. Flavor is sweet: sugar levels range from 13 to 14 Brix.

## POTATOES

Market continues to strengthen as count cartons are tighter at this time, particularly on the middle to large sizes (50ct through 80ct). FOB prices are again slightly higher. This trend is expected to continue. It is suggested that orders be placed earlier than usual to ensure timely arrivals and slightly lower delivery pricing. Transportation is not an issue at this time.

## RASPBERRIES

Raspberry harvests have increased significantly. Oxnard growers report higher and Northern California raspberry harvests have begun. Raspberry fruit quality continues to be very good. Prices will likely decrease through the next few weeks.

## RED CABBAGE

Red cabbage is a bit slow coming on to the central coast of California. Industry volume is very strong as Oxnard finishes heavy. Market is expected to increase. Georgia red cabbage is starting to ship.

## ROMAINE HEARTS

Average supplies this week. Steady supplies are expected for the new few weeks. Growing conditions are resulting in excellent quality.

## ROMAINE LETTUCE

Good supplies this week; however, shortage of supplies are expected in the next few weeks. Fringe burn is an issue. Crews are extremely selective with the product that is being packed. Lengths are 11- 12" per head and 37-39 lbs. per case.



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## 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.

## 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 generally 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 week or two.

## SQUASH (YELLOW)

**East:** Supplies remain short. Quality is only fair due to winds (scarring) and rain. Harvesting is mostly in the Plant City area.

**West:** Volume continues strong with generally steady FOB prices. Quality variable between growers but good quality can be found. Crossings should continue at Nogales for another week or two.

## STRAWBERRIES

Mexico harvests are finishing up in the next two weeks with warm temperatures south of the border. With higher daily temperatures and windy conditions, strawberry harvest in Oxnard and Santa Maria have begun to decline. Watsonville and Salinas strawberry harvests have picked up significantly. Strawberry orders can be placed in Northern California, alongside more of the mixed berry patch. Driscoll strawberry quality is very good.

## TOMATOES

### EAST

**Rounds:** This will be the last week of harvesting out of Immokalee. The Ruskin/Palmetto area has begun to harvest. Quality of these new fields is very good to excellent. Demand is weak. The FOB price of 5x6's is down, 6x6s are steady, and 6x7's are up.

**Romas:** FOB prices are steady this week. Nogales continues to set the roma market. Quality remains very good.

**Grapes:** Grape supply and demand are in equilibrium causing FOB prices to remain unchanged from last week. Quality remains very good.

**Cherries:** Supplies still good. FOB prices are down slightly. Quality continues good.

### WEST/MEXICO

**Rounds:** Vine ripens 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 volume is too low to establish a USDA FOB market. The supplies of mature greens continue to be extremely tight and no market report is available. 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

California new crop nectarine, peach, and plum harvesting has started; volume is low. Quality is fair. Sugar levels are approximately 9 for nectarines and range from 9 to 10 for peaches; numbers are not available for plums yet.

## WATERMELON

The market is near the bottom; Mexican volume (into Nogales and South Texas) is increasing. Offshore fruit (from Guatemala and Honduras into California and Florida) is adequate. Quality is good: sugar levels range from 12 to 14 Brix.