

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending May 16, 2014

## MARKET OVERVIEW

Supplies continue to be on the lighter side with steady prices for green leaf lettuce and romaine. Growing conditions for romaine hearts and bunched spinach are ideal, resulting in excellent product. Broccoli supplies are lighter, especially on bunched. Demand is good and pricing is steady. Cauliflower supplies remain extremely tight. Demand is good and pricing is higher. Limes continue to decrease in price from the extended extreme market situation that occurred for the last few months. Strawberry growers worked diligently through hot and windy California conditions last week, and now fruit quality is improving along with harvest volumes.

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	High	Good	↔
Blueberries	Moderate	Good	↑
Blackberries	Moderate to High	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	↓
Romaine Lettuce	Moderate	Good	↔
Romaine Hearts	Moderate	Excellent	↓
Green Beans	Extreme	Good	↑
Green Bell Peppers	High	Good	↑
Red Bell Peppers	Moderate	Good	↓
Cucumbers	Moderate	Good	↑
Yellow Squash, Zucchini	High	Fair	↑
Green Seedless Grapes	High	Good	↑
Peaches, Nectarines	High	Good	↔
Red Seedless Grapes	Moderate	Good	↓
Cantaloupes	Moderate	Good	↔
Honeydews	Low	Good	↔
Artichokes	Moderate to High	Excellent	↑
Spinach (Bunched)	Moderate	Excellent	↔
Arugula	Moderate	Fair	↑
Bok Choy, Carrots, Green Onions, Parsley (Curly), Red Cabbage, Baby Spinach, Spring Mix	Moderate	Good	↔
Snow & Sugar Snap Peas	High	Good	↑
Red Cabbage	Moderate	Good	↑
Fennel/Anise	Moderate	Good	↓
Asparagus, Peeled Garlic, Mache, Napa	High	Good	↔
Parsley (Italian)	High	Very Good	↓
Broccoli	Low to Moderate	Good	↔
Cauliflower	Higher	Fair	↔
Celery	Moderate	Excellent	↑
Cilantro	Moderate	Very Good	↔
Frisee	Moderate	Fair	↔
Green Cabbage	Low	Excellent	↔
Kale (Green)	Low	Very Good	↓
White, Yellow, Red Onions	Moderate	Good	↔
Potatoes	High	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	DONE



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## APPLES & PEARS

The market is level, but demand for small fruit is strong; large-size supplies are the most plentiful. Sugar levels measure 12 to 14 Brix (sugar to acid ratio). The D'Anjou market is average; large sizes are the most ample. Sugar levels range from 12 to 14 Brix.

## 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 excellent on the new crop with consistent shape and sizing, firm compact heads and good color. Prices are higher.

## ARUGULA

Demand exceeds supply on organic arugula.

## ASPARAGUS

Prices are steady, but elevated; demand is strong and stocks are tight. The market will start inching down next week. The Mexican and Peruvian harvests are nearly over. Quality is very good despite last week's heat.

## AVOCADOS

Prices are a bit higher than last week. California stocks are sufficient, yet Mexico remains the primary source. Small-size fruit is the most plentiful. Oil content is high and flavor is nutty.

## BELL PEPPERS

Expect the market to inch up until California supplies reach adequate levels. The season in mainland Mexico is winding down; Baja stocks are increasing. Quality is very good: flavor is sweet, yet zesty.

**East:** Increased supplies out of central Florida have lowered the FOB market. The south FL crop is finished. Quality is improving.

**West:** Nogales crossings are nearly at the end as we transition. Large pepper extremely tight from those growing regions. Quality continues to be suspect.

## BLACKBERRIES

Prices remain elevated; volume is low in Central Mexico. The California season will begin in late May. Quality is fair: light mold and bleeding are problems in some lots. Sugar levels measure 12 to 13 Brix.

## BLUEBERRIES

The market is level. Mexico will remain the primary supply source until California supplies increase to adequate quantities. Quality is very good: berries are slightly floral and sweet. Sugar levels are elevated, ranging from 14 to 18 Brix.

## BROCCOLI

Prices are slightly higher than last week; demand is strong and stocks are tight, especially in Mexico. Quality is very good, although big bead, hollow core, long stems, and bracketing are minor issues caused by last week's high temperatures.

## CANTALOUPE

Market is again all over the board depending on where and what it is, the east coast and west coast have offshore fruit that is fair to good quality, with value prices. We have started in California and overall quality is excellent with great internal and external color and good sugar out of the desert. We expect to have good volumes out of California and Arizona going forward. Also a great time to promote California melons. 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, TX.

## CAULIFLOWER

Strong demand is keeping prices up; volume is low, but all sizes are available. Quality is very good: heads are snowy white and firm.

## CELERY

The market is near the bottom. Supplies are ample in Oxnard and Santa Maria; seeder is a minor issue.

## 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 generally steady. Quality very good.

**West:** Quality is extremely variable from grower to grower with pricing reflecting the quality. Crop is in transition.

## FENNEL/ANISE

Prices have returned to reasonable levels with normal production volume in the Salinas Valley.





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## **GARLIC**

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

## **GRAPEFRUIT**

Sunkist Rio Red grapefruit remains 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. Sizes are best on 36s smaller with volumes heaviest on 40s – 56s.

## **GRAPES**

Market is all over the board depending on where and what it is, the Chilean Crimsons are still around and will be for the next 7-10 days and the Chilean greens are basically done with exception of a few on the east coast, but quality is hit and miss. We have started in Coachella and Mexico with flames, perlettes and a light way on sugarones, we will see the market continue to adjust next week and should stabilize by the end of next week or first of the following week as we increase volume out of both areas. We have good volumes going forward and we are about 2 weeks ahead of schedule out west in both regions, we expect to be peaking in time for the memorial day pull, so a great time to promote. Red seedless prices are slightly lower; sugar levels range from 17 to 18 Brix.

## **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 have increased for East coast as Georgia has started. California central coast green cabbage have good volumes as well. Weights are well above 50 lbs. The cabbage has very good green color and the market is steady.

## **GREEN ONIONS**

Plentiful supplies this week with nice quality. Mediums sizes continue to dominate followed by pencils. Large are extremely tight. Very good numbers are still arriving from Mexico.

## **HONEYDEW**

Market is a little soft on the 8's and 9's out of Mexico with

very good quality, the 6's and larger are a little stronger and we have started in a light way out of California Desert with excellent overall quality. The fruit has a nice green to cream color and great sugar and internal color. Sugar levels range from 11 to 13 Brix.

## **ICEBERG LETTUCE**

Prices are firm to slightly lower. Last week's heat increased growth, but mildew has become a quality problem. Demand is good. Quality is fair with weights 42-47 lbs., firm heads, medium size and pale color.

## **JALAPEÑOS**

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

**West:** Supply strong but demand is stronger. FOB prices are up. Quality is excellent.

## **KALE (GREEN)**

Very good supplies this week in Salinas Valley. Overall quality and appearance is nice with bunches and lengths measuring 8-10" and dark green color.

## **KIWI**

Tight availability will continue through the season for Chilean kiwi. At least 50 percent of the crop has been lost due to a freeze that occurred during the budding season.

## **LEMONS**

Market very strong with excellent demand on all sizes. We are all into dist. 2 fruit now and you will see some rougher texture and some fruit that is a little on the soft side but overall juice content is excellent. Expect the market to continue strong and prices will go up .50-1.00 per week until we get some imports from Chile around mid-June, which should help ease things a bit. Flavor is tart: sugar levels range from 6 to 8 Brix.

## **LETTUCE (GREEN LEAF)**

Prices have dipped; supplies are plentiful. Quality is very good: mildew is a minor problem, but growers are peeling damaged leaves.

## **LIMES**

Prices are lower, especially for small sizes; large fruit remains limited. Expect the market to ease through May and June. Quality is good, yet brown spotting and scarring are problems.

## **NAPA**

Tight supplies for growers in Central California.



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## ONIONS

Texas is having many issues with poor size profile and inconsistent supply. There are some straight loads of jumbo yellows available from there but will not be able to fill mixers. California has had some very nice product, great size on all varieties. The market is weaker this week as production exceeds demand but only modestly. This market will not stay flat for very long, we expect to see some better FOB prices by the end of the month as some growers look like they might run into a small gap.

## ORANGES

Market steady to strong with good demand on all sizes. The navel quality is good to fair with some fruit showing puff and crease and some isolated dry cell, but mostly good juice and excellent sugar content. The Valencia's are in good shape with fairly firm fruit and excellent juice and better sugar than normal at this time of year. We will have good supplies of Valencia's going forward but 113's and 138's remain tight due to heavy demand. Sugar levels range from 11 to 12 Brix.

## PARSLEY (CURLY & ITALIAN)

For the past month, shippers have been fighting a seeder condition in Parsley and Italian Parsley fields. This seasonal shift to warmer temps creates high stress on the plants resulting in an accelerated growth rate. The plant is growing so vigorously that the plant "flowers" or goes to "seed". This is a condition prevalent across the entire Ventura County/ Oxnard growing plains. Harvest production was just downgraded again due to the seeder. Harvesting is currently at about 50% of forecasted volume. The condition is anticipated to last through the remainder of May. Prices are steady and expected to come down as early as this weekend.

## PINEAPPLES

Prices are stable; strong demand is keeping volume low. Expect the market to ease later this month. Flavor is sweet: sugar levels range from 13 to 14 Brix.

## POTATOES (IDAHO)

The market took another up turn this week on most the middle to larger sizes. The demand on all cartons in Idaho has been very good again this week. Look for your #2's grades to continue to be the real value for the rest of the month. At this time we anticipate FOB pricing to stay bullish for the rest of May and into June. We had very good weather and the crop went in early. If the good weather continues we could see new crop a couple weeks earlier than normal.

## RASPBERRIES

Prices have steadied; stocks will continue to increase through May. Quality is very good, yet bleeding is a minor issue. Sugar levels are high, ranging from 13 to 14 Brix.

## RED CABBAGE

Red cabbage supply is very light since Salinas is starting very slow. Industry volume is very strong as Oxnard finishes heavy. East coast is in good supply and quality is good.

## ROMAINE HEARTS

Above average supplies this week. Supplies over the next few weeks should be steady. Quality and condition are both good, featuring light green color and light cupping, 11-12 inches in length and 25 lb. range carton weight.

## ROMAINE LETTUCE

The market has started inching down; supplies are adequate. Quality is very good, but last week's heat caused fringe burn, mildew, and internal burn problems.

## SNOW AND SUGAR SNAP PEAS

Prices continue to firm 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)

Tight availability on organic.

## SPINACH (BUNCHED)

Overall market has reached its peak as more acreage and very high yields come forth. Case weights are 19-21 lbs. and feature large full bunches; generally clean product, but some mechanical damage may be noted where the bunches are tied.

## SPRING MIX

The market is steady. Average supplies for new crop production in Central California (Hollister, San Juan Bautista, and Watsonville). Looking ahead, extreme temperatures are in the forecast next week, having the potential to affect quality and yield for shipments in mid-May.

## SQUASH (GREEN)

**East:** Plant City continues to harvest. Prices are showing upward pressure due to tighter supplies. Quality is good.

**West:** Quality variable between growers but good quality can be found. FOB prices generally steady. Product should continue to cross through Nogales for another week or so.





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## SQUASH (YELLOW)

**East:** Squashes, especially yellow, are the hot produce items this week. Supplies are extremely tight due to the rains last week. FOB prices up. Quality is only fair due to winds (scarring) and rain. Harvesting is mostly in the Plant City area.

**West:** 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

The market is a bit firmer than expected; last week's hot weather has minimized berry size. Quality is best in Santa Maria and Salinas/ Watsonville. Fruit is sweet: sugar levels range from 14 to 15 Brix.

## TOMATOES

### EAST

**Rounds:** Demand is weak and supplies are good out of the Ruskin-Palmetto fields. This is driving FOB prices down on all sizes. Quality of these new fields is very good to excellent. We look for FOB prices to be at these low levels for a couple more weeks. The longer term outlook calls for shorter supplies as we move into the Quincy and SC crops (June) with much higher FOB prices.

**Romas:** Good supplies, weak demand. FOB prices are down on all sizes from last week. Quality remains very good.

**Grapes:** Grape supply very good. FOB prices are down on the 12/1 pints. Quality remains very good.

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

### WEST/MEXICO

**Rounds:** Vine Ripes continue at the Suspension Agreement minimums. Crossings continue at Nogales but harvest in this area of Mexico at the very end. Crossings at San Diego have begun but volume is too low to establish a USDA FOB market. Crossings at McAllen continue with light volume and prices are at the minimum. Quality is generally fair to poor.

**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.

**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 and peach supplies are increasing; plum stocks will become more plentiful later in May. Quality is good and sugar levels are approximately 9 for nectarines and range from 9 to 10 for peaches; numbers are not yet available for plums.

## WATERMELON

Prices remain low; Mexican stocks (into Nogales and South Texas) are ample. Offshore fruit (from Guatemala and Honduras into California and Florida) is sufficient. Quality is good: sugar levels range from 12 to 14 Brix.