

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending May 23, 2014

MARKET OVERVIEW

The Salinas Valley is expected to have elevated temperatures this week in the growing regions. Due to these high temperatures, issues are anticipated with leafy greens, including but not limited to, romaine and arugula, as well as broccoli and strawberries. Cauliflower also continues to be active and short in supply. With the extreme heat two weeks ago coupled with frigid weather over the weekend, internal and external fringe burn along with other quality issues will be prevalent in the upcoming weeks. Labor will also continue to be a concern as the crews will most likely be pulled out of fields by early morning due to the anticipated extreme heat. Limes continue to decrease in price from the extended extreme market situation that occurred for the last few months.

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



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APPLES & PEARS

Most prices are steady, yet demand for small sizes remains strong; large-size fruit is ample. Sugar levels measure 12 to 14 Brix (sugar to acid ratio). D'Anjou prices are level; small sizes are tightening. The California season will begin in early July. Sugar levels range from 12 to 14 Brix.

ARTICHOKES

Strong demand driven by very lights supplies this week and for the several weeks. Like many items, harvesting is ahead of schedule thus creating a gap. Prices are higher and expected to climb especially on 12s through 24s.

ARUGULA

Heavy demand continues to limit availability.

ASPARAGUS

The market remains elevated, but should ease by next week when California supplies increase. This week's hot weather will aid growth. The Mexican and Peruvian seasons are winding down. Quality is very good despite last week's heat.

AVOCADOS

The market is high. Supplies are being sourced equally from California and Mexico; 48-count and No. 2 grade fruit is tight. High oil content is creating nutty flavor and creamy texture.

BELL PEPPERS

South Florida has finished up pepper production except for cleaning up fields with some choice product. As per the normal pattern, production has moved up to the Plant City area. However, yields have been affected by rains, leaving the market short on retail-quality fruit. With Georgia on tap to start during the first week of June, availability will remain very tight for the next three weeks. Looking West, we are facing a slight gap in production. With mainland Mexico finishing up and the California desert winding down early due to excessive heat, availability will be tight for at least another 7-10 days until Bakersfield starts up. Size is also a concern, as most Western fruit is large rather than XL or jumbo. Red and Yellow prices are up slightly. California stocks are sufficient. The season in mainland Mexico will continue for two or three more weeks; Baja supplies are increasing. Quality is very good: flavor is sweet, yet zesty.

BLACKBERRIES

The market is high. The California harvest has started, but supplies are limited. The Mexican season is winding down; volume is low. Quality is light mold and bleeding are problems in Mexico. Sugar levels measure 12 to 13 Brix.

BLUEBERRIES

Prices are stable. California new crop stocks will increase in approximately two weeks. The Mexican season is ending. Quality is very good: berries are slightly floral and sweet. Sugar levels are elevated, ranging from 14 to 18 Brix.

BROCCOLI

The market is rising; demand is strong. Supplies are limited; some California growers are experiencing a harvesting gap. Quality is very good, although big bead, hollow core, long stems, and bracketing are slight problems in some lots.

CANTALOUPE

Market is steady with good demand, but there is a range in price depending on the region the fruit is coming from, California or Honduras. The Honduran fruit is getting a little tired and should be cleaned up by the weekend or first of next week. The California fruit is picking up volume but things could slow a little as we expect 100-110 degrees in the desert starting tomorrow. The plants will slow down and take care of themselves and volumes will dip a little, but should get back to normal middle of next week as temperature ease up back to normal. The overall quality of the fruit is good with excellent sugars and internal color, there is some checkerboard color and some loose packs due to range in sizes. 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

The market remains elevated; expect limited supplies for several more weeks. Quality is very good: heads are snowy white and firm.

CELERY

Low prices persist; stocks are plentiful in Oxnard and Santa Maria. Quality is very good: seeder is a slight issue.

CILANTRO

Lighter supplies this week. Quality is good with 9-11" in length with good green color. Prices are increasing.

CUCUMBERS

In the East, recent weather challenges have left Central Florida with light cucumber volume and marginal quality, at best. Georgia is behind schedule but should start with light volume in 10-14 days. Until then, we look West



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to find retail caliber cucumbers. Due to the western growers having increased expenses in infrastructure and needing to make changes to deal with the water issues (water rights, desalination plants, building ponds, etc.), less fruit has been planted and the deal looks to be short. In addition, growing areas have seen hotter than normal temperatures. If they continue to see hot, windless days, we will see quality issues as well.

FENNEL/ANISE

Supplies are readily available on fennel. Quality is very nice. 18s, 24s, 30s are predominate. Market should be steady for the week and could become more active in the next few weeks.

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.

GRAPES

Market is all over depending on what it is, the Chilean reds that are still around look good and are more reasonably priced as they are wanting to be done by the first of next week which will leave only Mexico and Coachella Valley fruit. The overall quality on the Coachella fruit is excellent with great color and sugar and very strong fruit. The Mexico fruit is good but quality is a little more erratic in size but overall a good box. We have good volumes out of both districts but we did start about 2 weeks earlier than normal which will help get the crop moved and should have a smooth transition into the central valley around the first of July. This is an excellent time to promote Table Grapes. Green seedless sugar levels are approximately 18.5 Brix, while red seedless levels range from 17 to 18 Brix.

GREEN BEANS

There are very few beans left in South Florida and much of Central Florida's crop has been lost. Beans will continue to be very short in the East until Georgia starts up in approximately two weeks. The California desert is on the way out for the season, but light production has begun in Fresno and Baja.

GREEN CABBAGE

Volumes have increased for California central coast green cabbage. Weights are well above 50 lbs. The cabbage has very good green color and prices are increasing. East Coast Georgia is seeing good quality and good supply.

GREEN ONIONS

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

HONEYDEW

Market is very strong as supplies are light coming out of Mexico and California as well, we expect to see some better supplies out of Mexico the middle part of next week and hopefully start with some more volume out of California depending how long this heat wave lasts. The overall quality is excellent with very clean green to cream exterior and great internal color and sugars. We expect to have good volumes by the end of next week and carry through until the end of June and then start on the Westside. We will have about the same amount of plantings as last year on melons on the Westside but will be using more well water which will produce smaller sized fruit due to the alkalinity of the water. Quality is very good: sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Good supplies available this week in Salinas. Quality is good, 30s are limited. Weights are 41-43 lbs.

JALAPEÑOS

East: Supplies available with generally steady FOB prices. Quality is good.

West: Supplies are very good putting downward pressure on prices. Quality remains excellent.

KALE (GREEN)

Very good supplies this week in Salinas Valley. Overall quality and appearance is very nice with bunches and lengths measuring 12-14" 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 and grades, we are only in dist. 2 fruit and there is a wide



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range of maturity depending the block. Overall juice content is excellent you will see some rough textured fruit and some wind scar. Expect the market to continue to rise each week by .50 to 1.00 through the next 2 months and then we hope to see the Chilean arrivals help ease the market. We do not expect to have the troubles we had in August and early fall as we are ahead of schedule out of the Desert which will probably start around the end of August which is about 2-3 weeks early. Flavor is tart: sugar levels range from 6 to 8 Brix.

LETTUCE (GREEN & RED LEAF)

Green leaf supplies are extremely light due to quality. Contracts are being covered only up to 10 week average numbers on romaine leaf, green leaf, and red leaf. The burn issues (internally and external fringe burn) have been caused by the extreme heat of two weeks ago and the cold spell/ extreme wind from last week. With the extreme heat this week the weather has been 90-105 degrees depending on location in the Salinas valley. Light supplies/quality issues are expected to continue for at least the next 2-3 weeks.

LIMES

The market continues to inch down, especially for small sizes. Quality is good, yet brown spotting and scarring are problems. As new crop fruit is harvested, quality will improve.

NAPA

Tight supplies for growers in Central California.

ONIONS

The onion market in CA is mostly steady with the exception of reds which are down. Quality and supply have been very good to date. Although there will be CA onions well into July, some grower shippers will make the transition to New Mexico.

ORANGES

Market is strong on all sizes with excellent demand and quality, we have navels still going that are eating excellent and over strength and condition is excellent for these late varieties we are expecting some very warm temperatures through the state this weekend and into next week. We will start to see some dry cell show up if we get into the 100's and the navels will probably be finished by the end of this month. The Valencia's will fair ok through the heat as they are resilient, the Valencia's look excellent with good sugar and juice content. We will have good supplies of Valencia's through the summer and quality should continue to be very good. Sugar levels range from 11 to 12 Brix.

PARSLEY (CURLY)

Lighter supplies this week, due mainly to a small gap between plantings. Overall quality remains nice. Bunches are averaging 8- 10" in length and showing dark green color. Prices have increased due to short supplies.

PARSLEY (ITALIAN)

Supplies have improved this week. Overall quality and appearance continues to be nice with 9-11" in length with dark green color. Availability throughout the industry has improved thus prices are begin to decrease.

PINEAPPLES

The market has inched up a bit, but supplies are expected to increase by the end of the month. Flavor is tangy, yet sweet with tropical notes: sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

The market continues to be brisk as demand is strong on all cartons. Idaho is seeing some mid-level count sizes moving up into the teens and if demand keeps the current pace we should see most sheds moving toward that number quickly. There is still an abundant supply of #2's and with that the increases associated with off grades will be less than what we are seeing with our cartons.

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

Good supplies this week. Quality should not be affected by the increasing temperatures in CA. Georgia has good supplies and good quality.

ROMAINE HEARTS

Average supplies this week. Good quality. Due to the extreme heat a few weeks back, there are some fringe burn issues. Romaine heads will be slightly leafier than previous weeks with weights on a three count bag in the 23-24 oz. range with 10-11 inches head length.

ROMAINE LETTUCE

Very light supplies this week in Salinas. Warmer than normal weather this week is causing light amounts of fringe/ tip burn. Weights are 38- 39 lbs. per case and 11-12" per head. Demand is very strong industry wide and with Eastern growing areas behind due to the extended winter weather, the demand exceeds supply situation is expected to continue for a few more weeks.



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SNOW AND SUGAR SNAP PEAS

The market continues to strengthen 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)

Steady availability.

SPINACH (BUNCHED)

Increased demand is strengthening the market. Southern growing areas (Oxnard-Santa Maria, CA) have been hit hard with Santa Ana wind damage hindering production. Overall, quality is good, featuring large and full bunches, measuring 9-11" in length and weights of 20-22 lbs.

SPRING MIX

Prices are unchanged. Quality is very good, but mildew, yellowing, and shortened shelf-life remain problems in organic arugula. As always, it's critical to maintain the cold chain.

YELLOW SQUASH & ZUCCHINI

In the East, Plant City's squash has been impacted by weather so quality is poor. New fields are just starting up in Georgia with very light volume. We expect availability to improve next week as production gears up in Southern Georgia. In the West, growing areas are in transition from Hermosillo to Baja and Santa Maria.

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: The South Florida crop completely finished this week. All Florida harvesting is in the central part of the state-Ruskin/ Palmetto area. FOB prices are up slightly on all sizes but supplies are very good keeping prices close to minimum levels. Quality is excellent. Rain is expected in the next 24-48 hours. This may cause a little disruption in harvesting but should have little effect on the market. Market should be toward the minimum for the next week or two. We are forecasting a small gap between the Central Florida crop and the North Florida/ Southern Georgia crop because earlier rains delayed plantings. That crop will not be ready until around the second week of June. Depending on when the Ruskin/ Palmetto crop ends will determine the length of the gap.

Romas: Roma market is steady and remains near the bottom as supplies remain strong. Quality remains very good.

Grapes: Grape supply very good. FOB prices generally steady. Quality remains very good.

Cherries: Supplies still good. FOB prices generally steady. Quality continues very good.

WEST/MEXICO

Rounds: Some growers have started to harvest out of CA. Quality is very good. Meanwhile, Nogales crossings are at their very end. Quality there is fair at best as growers try to salvage the very end of their crop. A lot of product is being dumped due to quality. 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 variable from shipper to shipper but very good quality can be found. We see very good supplies for the foreseeable future.

Grapes: Grapes have started to cross at Baja with decent volume. Quality is good.

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

TREE FRUIT

The California nectarine and peach markets are elevated; stocks are tight, but will increase as the season progresses. Plum supplies are on the market, but very scarce. Quality is average: sugar levels are approximately 9 for nectarines and range from 9 to 10 for peaches; numbers are not yet available for plums.

WATERMELON

The market is climbing; Memorial Day demand is strong. Although Mexican supplies (into Nogales and South Texas) are sufficient, the offshore season (from Guatemala and Honduras into California and Florida) is wrapping up. Quality is good: fruit is firm and sweet. Sugar levels range from 12 to 14 Brix.