

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending May 30, 2014

MARKET OVERVIEW

Due to last week's high temperatures in the Salinas Valley, leafy greens—including but not limited to—romaine and arugula, as well as broccoli, cauliflower, celery and strawberries are experiencing some quality issues. With the recent extreme heat, coupled with frigid weather over last 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 late 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	Low	Excellent	↔
Blackberries	High	Good	↔
Strawberries	Low	Good	↑
Raspberries	Low	Good	↔
Grapefruit	Moderate	Excellent	↔
Lemons	High	Good	↑
Oranges, Navels, Valencias	High	Good	↔
Limes	High to Extreme	Good	↓
Pineapples	Moderate	Good	↔
Green & Red Leaf Lettuces	High	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	High	Good	↑
Yellow Squash	High	Good	↔
Zucchini	High	Good	↓
Green Seedless Grapes	Extreme	Good	↔
Peaches, Nectarines	High	Good	↔
Red Seedless Grapes	Low	Good	↔
Cantaloupes, Honeydews	Moderate	Good	↔
Artichokes	High	Excellent	↑
Spinach (Bunched)	Moderate	Excellent	↔
Arugula	Moderate	Fair	↑
Bok Choy, Broccoli, Carrots, Baby Spinach, Spring Mix	Moderate	Good	↔
Parsley (Curly)	Moderate to High	Good	↑
Fennel/Anise	Moderate	Very Good	↔
Asparagus, Peeled Garlic, Mache, Napa, Snow & Sugar Snap Peas	High	Good	↔
Parsley (Italian)	High	Very Good	↓
Green Onions	Low to Moderate	Excellent	↔
Cauliflower	High	Fair	↓
Celery	Low to Moderate	Fair	↔
Frisee	Moderate	Fair	↔
Cilantro	Moderate to High	Good	↔
Green Cabbage	Moderate	Excellent	↑
Kale (Green)	Low to Moderate	Very Good	↔
Yellow, Red Onions	Low	Good	↓
White Onions	Moderate	Good	↔
Potatoes	High	Good	↑
Round, Roma, Plum, Cherry, Grape Tomatoes	Moderate	Good	↑
Red & Golden Delicious, Bosc Pears	Moderate	Good	↑
Galas, Granny Smiths, Fujis, D'Anjous	High	Good	↑



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APPLES & PEARS

Demand and movement have slowed down as schools begin to close for the summer and retail shelf space shrinks to make room for more seasonal stone fruit and grapes. Lower grades are in very tight supply 113s and smaller, mostly on the red delicious. Export demand has slowed but still active. Some discounting still exists on shipper select varieties, grade and size most readily available (88 lgr). Storages are running low and some shippers are winding down on a few of their varieties. Washington pears are pretty much done for the season. Hood River will ship into June, peaking on 90 larger. Imports are available, high prices, quality reported as good.

ARTICHOKES

Harvest locations for this week will be better for size diversity; better output on the large and middle size group, 24-36s and also size 48s. This weekend should be back to heavier numbers on the 12s and 18s. Quality remains excellent with good, consistent color and tight, compact heads.

ARUGULA

Tight supplies for both conventional and organic.

ASPARAGUS

Eastern Washington is now in full swing and is the primary district. Prices are trending lower.

AVOCADOS

The Avocado market is generally stable. Mexico sent 29% less volume last week than the previous week, while harvesting in California remained stable. Overall, supplies dropped 19% last week and total industry inventory levels are in a much healthier position. FOB prices in Texas particularly, have dropped this week. Pricing in California and on the East Coast are more stable. This market dynamic can be attributed to both the quantity of importers and increased inventories of late-season fruit in South Texas. The fruit is fresh, but has limited shelf life due to high dry weight. Sizing is heavy to 48s and larger, and will remain that way for the balance of the month. Eating quality on Mexican late-season and California mid-season avocados are both excellent. High oil content is creating nutty flavor and creamy texture.

BELL PEPPERS

Demand exceeds supply on green bell peppers in the West (Coachella, Nogales) as a production gap has developed prior to the beginning of the harvest in the

Southern San Joaquin Valley that will occur next week. Red bells have better availability by comparison, however supplies will continue to tighten as growers harvest early (prior to turning color) in order to take advantage of current high prices for green bells; thereby reducing the supply of red bells. All eastern vegetable items remain active and critical including peppers. Demand is strong. Central Florida is harvesting around the Plant City area. FOB prices are stronger this week. Quality is fair to good. If the weather stays warm in the Quincy/South GA area, the new crop will come along quickly and give some relief to the critical shortage of supplies.

BLACKBERRIES

Producing regions: Central Mexico, Santa Maria, Watsonville, Salinas. Quality/weather: Central Mexico has an 80% chance of rain this week for most growing areas, this may impact production during the week. Availability: We anticipate Mexico to decrease rapidly while CA starts a slower climb week over week. Expect product to be tight throughout the transition. Santa Maria and Oxnard production will start in mid-late May. Production to recover mid-late June. Organics available, supplies increasing. Sugar levels measure 12 to 13 Brix.

BLUEBERRIES

Producing regions: Florida, Georgia, California, N. Carolina, Baja, Central Mexico. Overall good quality. 6 oz. and pint blueberries are available for new business on East Coast. Baja, Oxnard and San Joaquin Valley are declining in volume. Washington is expected to start in the next four weeks. We could see a gap with these production areas. Organic blues, CA production is decreasing and NC will start packing this weekend. Quality is very good: berries are slightly floral and sweet. Sugar levels are elevated, ranging from 14 to 18 Brix.

BROCCOLI

Slightly less supplies this week due to last week's high temperatures. Demand and quality are good; good green color and small to medium bead sizing. Sizing will be good on a daily basis; crowns should be available throughout the week.

CANTALOUPE

Good volumes out of the Arizona and California deserts, and overall quality looks very good with good sugars and excellent firm fruit. The fruit is mostly a clean net with some showing a little checkerboard color but over all good strong fruit. Suppliers will be going in the desert through June, then transition to the Westside and should have good supplies of fruit through the transition as they



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may start earlier than normal on the Westside.

CARROTS

Supplies are steady in California and Georgia; plentiful availability from Mexican growers, loading in McAllen, TX.

CAULIFLOWER

Less supplies available this week but are improving, thus prices are decreasing from recent highs. Quality is good with off-white medium size curds and well trimmed jacket leaves.

CELERY

Supplies are available in Oxnard though quality is fair due to issues in the field of insect damage and dehydration. Overall color is a strong green with lighter case weights of 50-52 lbs. Sizing is off considerably due to high winds, small sizing and lighter weights. Prices should be steady. Celery will start in June in Salinas.

CILANTRO

Lighter supplies again this week. Quality is good with 8-10" in length with good green color. Prices have increased since last week.

CUCUMBERS

Demand exceeds supply, as rain last week has slowed the new crop harvest in Georgia. Light supplies in all growing areas (Baja California, Northern Mexico, Florida) will continue to support current high prices.

GARLIC

The new crop harvest will begin in June, however this garlic is not used for processing (peeled garlic) due to water content. New crop peeled garlic will be available in late July. Until then, storage crop will continue to be available for processing.

GRAPEFRUIT

Demand has improved as Texas is finishing for most. The market is steady, both Rios and Stars available. Sizes are mostly 40s smaller. Better deals on large choice grade Rios. Rubies are now packing; expect full range of sizes with best volumes on 32s larger. White grapefruit is available with sizes peaking 40-48-36s.

GRAPES

We are in full swing out of Coachella and Mexico and are expecting our heaviest volumes out of those regions. Reds and greens continue to be a little light and very firm on prices as Mexico is about 30-40% lighter on greens than normal. The overall quality on both colors out of both districts is excellent with very good color and sugar,

and nice firm berries. We will be going in those regions until the end of June and then start in the central valley around the end of June. Green seedless sugar levels are approximately 18.5 Brix, while red seedless 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 harvest just beginning with limited supply.

GREEN CABBAGE

Good supplies. The high temperatures of last week have not caused any issues with the cabbage quality; great color with medium to large sizing. Demand has increased for California cabbage.

GREEN ONIONS

Ample supplies for the next few weeks. Prices are in the lower range for iced and moderate for iceless. Color is great and there are some extra-large available.

HONEYDEW

Market very active and strong out of California and Arizona desert and Mexico, the overall quality is good to fair with some fruit showing some heavy scarring and some oblong fruit with mostly a green to cream cast. Expect supplies to remain tight thru the next 7-10 days and then hopefully we will see some relief. We will also transition around the end of June to the Westside fruit. Quality is very good: sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Demand for lettuce has been improving since last week causing prices to decrease. Quality is good. 30s are limited in supply. Weights are 38-44 lbs. with firm heads and good color. Lettuce supplies are expected to remain steady this week. Prices are expected to remain steady to higher. Weights are 38-44 lbs. with firm heads and good color. Lettuce supplies are expected to remain steady this week. Prices are expected to remain steady to higher.

JALAPEÑOS

East: Supplies available with generally steady FOB prices. Quality is very good. Harvesting around the Plant City area.

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.



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KIWI

Kiwi availability has tightened considerably. Chile is now the primary source; shipments are down this season by 40 percent to the West coast and 57 percent to the East - due to a freeze that occurred during the budding season.

LEMONS

Market very strong with excellent demand and light supplies on all sizes. Expect things to keep tight as we progress through our district 2 volume through the summer, and we will be expecting some Chilean fruit around the end of June which will help ease the current situation and hopefully see prices become more steady. We do expect prices go up .50-1.00 each week until that time. Flavor is tart: sugar levels range from 6 to 8 Brix.

LETTUCE (GREEN & RED LEAF)

Drastically short supplies of green leaf but normal on red. Quality is strong on what is being packed. Green and red leaf will be 22-25 lbs. per case and 9- 11" long.

LIMES

Prices continue to fall, particularly for small fruit. The market should start easing in June. Quality is improving, yet brown spotting and scarring remain minor issues.

NAPA

Tight supplies for growers in Central California.

ONIONS

Market has eased up on all colors and sizes this week. The Imperial Valley in Southern California is at the peak of their shipping season and will have good supply on all three colors for the next two weeks. Supplies remain heavy to a smaller size profile in Texas that is peaking on Medium Yellows, with very few Super Colossal Yellow Onions available. New Mexico also will start shipping Onions next week. 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 steady to firm with good demand on all sizes especially on 88's and smaller, the overall quality of Valencia's is excellent with a slight tinge of green around the bloom and blossom end. The sugar and juice content are very good and expect quality to continue to be good going forward barring any major weather.

PARSLEY (CURLY)

Lighter supplies again this week, due mainly to a small gap between plantings. Overall quality and appearance

remain nice. Bunches are averaging 8- 10" in length and showing dark green color. Prices continue to rise.

PARSLEY (ITALIAN)

Plentiful supplies this week. Overall quality and appearance continues to be very nice with 8-10" in length with dark green color.

PINEAPPLES

Although supplies are becoming more plentiful, prices are slightly above normal for this time of the year. Volume should increase next month. Flavor is tangy, yet sweet with tropical undertones: sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

The market continues to gain strength each week as demand is still brisk in the state of Idaho. You can expect FOB increase for this coming Monday as well. Rumor mill has that some of the smaller sheds aren't sure if they have the supply to continue to ship until new crop. Overall quality at receiving point has looked very good and most all seem to be pleased.

RASPBERRIES

Producing regions: Central Mexico, Baja, Oxnard, Watsonville, Santa Maria. Conventional and organic production bouncing back from last week's heat. Overall weather this week is expected to be favorable in CA/Baja with potential warm temps late in the week but not to interrupt production. Central Mexico is expecting some rain mid to late in the week. CV and OG production/availability will be strong through the month of May and into June with a combination of various regions performing at the same time. Sugar levels are high, ranging from 13 to 14 Brix.

RED CABBAGE

Steady supplies this week with slightly better yields but the market continues to climb.

ROMAINE HEARTS

Slightly less supplies this week. With last week's temps, some product was discarded due to tip burn. Demand is very good. Overall quality is good although on the leafy side. Tip burn issues are being worked around; taking care of what goes into final product.

ROMAINE LETTUCE

Steady supplies this week. Demand is very good with lighter supplies in California and delayed start in regional Eastern U.S. and Canadian growing areas. Quality remains strong despite last week's high temps in California. Each head should be 11-13" long and packs weighing 37-39



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lbs. per case. Occasional minor fringe burn.

SNOW AND SUGAR SNAP PEAS

The market remains firm, with Salinas and Santa Maria now the primary California districts for snap peas; Santa Maria for Snow peas.

SPINACH (BABY)

Steady availability for conventional, tight on organic.

SPINACH (BUNCHED)

Very strong yields this week. Market demand is very strong with Oxnard and Santa Maria growing regions having had extreme wind damage to their fields, cutting production in half, making the demand in Salinas's district strong. Quality is excellent with very large full bunches, dark green color, very light wind burn and 20-22 lbs. carton weights.

SPRING MIX

Steady availability, with minimal effects from the heat wave that occurred last week.

SQUASH (GREEN)

East: Plant City continues to harvest. Prices remain strong due to tight supplies. See info on the yellow squash as it relates to the weather and expected relief. Quality is good. Even though extremely tight, we do expect to be able to fill large zucchini orders.

West: Same as yellow.

SQUASH (YELLOW)

East: Supplies continue to be extremely tight but some relief is in sight. The time frame will depend on the weather. Fortunately, daytime highs are expected to be in the mid 90's through the weekend in Quincy. FOB prices remain high. Quality is only fair due to winds (scarring) and rain. Harvesting is mostly in the Plant City area with some volume beginning to come out of GA and SC.

West: Squash crossings are over at Nogales. Quality variable between growers. FOB prices remain strong as we transition.

STRAWBERRIES

Producing regions: Central Mexico, Baja, Santa Maria, Watsonville, Salinas, Oxnard. Growers are partnering with each other at the field level to minimize dock rejections and maintain product quality, feeling confident that quality is good. Production is increasing as the later part of May approaches and start of June. Watsonville, Salinas and Santa Maria will continue to be the primary loading locations with strongest production. Oxnard, Baja and

Central Mexico will decline moving forward. Sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: All Florida harvesting is in the central part of the state—Ruskin/Palmetto area. FOB prices are up on all sizes due to this area not being able to keep up with demand. No additional supplies will be available until Quincy and South GA begin, which will be in about 2-3 weeks. Quality remains very good to excellent. Light volume is coming out of the west also.

Romas: Roma market also up. Quality remains very good.

Grapes: Grape supply still good. FOB prices up slightly. Quality remains very good.

Cherries: Supplies still good. FOB prices have been generally steady but are showing signs of strengthening. Quality continues very good.

WEST/MEXICO

Rounds: Nogales crossings are at their very end. Quality there is fair at best as growers try to salvage the very end of their crop. Crossings at San Diego continue but volume remains low.

Romas: Nogales and McAllen crossings continue and San Diego is beginning its second week of crossings. FOB prices remain at suspension agreement minimums. Quality is variable from shipper to shipper but very good quality can be found. We see 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, peach, and plum markets are steady; supplies are increasing. Quality is good: sugar levels are approximately 9 for nectarines and range from 9 to 10 for peaches; numbers are not yet available for plums.

WATERMELON

Retail ad commitments for Memorial Day continue to support prices for both Mexican and Florida watermelon growers. A wide range in quality exists for watermelons in the West. Price strength is expected to continue well into June.