

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending June 6, 2014

## MARKET OVERVIEW

Due to high temperatures in the Salinas Valley in recent weeks, leafy greens including romaine, romaine hearts, artichokes, arugula, broccoli, cauliflower and fennel supplies remain lower or average in supply. Prices are very active for California iceberg lettuce for late week shipments, the result of reduced yields following the mid-May heat wave and a seasonal reduction in planted acreage. The avocado market is generally stable. Good demand and quality on most citrus items. 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	Good	↔
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 and Iceberg Lettuces	High	Good	↔
Romaine Lettuce	High	Fair	↔
Romaine Hearts	High	Good	↔
Green Beans	Extreme	Good	↔
Green Bell Peppers	Extreme	Good	↑
Red Bell Peppers	Moderate	Good	↑
Cucumbers	High	Good	↔
Yellow Squash	High	Good	↔
Zucchini	High	Good	↓
Green Seedless Grapes	High	Good	↓
Peaches, Nectarines	High	Good	↔
Red Seedless Grapes	Low	Good	↔
Cantaloupes, Honeydews	Moderate	Good	↑
Artichokes	High	Excellent	↔
Red Cabbage, Spinach (Bunched)	Moderate	Excellent	↔
Arugula, Frisee, Green Cabbage	Moderate	Fair	↔
Bok Choy, Celery, 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	Excellent	↔
Broccoli	Low to Moderate	Good	↓
Cilantro	Moderate to High	Good	↔
Kale (Green)	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. Sugar levels measure 12 to 14 Brix.

## ARTICHOKES

Light supplies continue this week in Salinas although volume is beginning to step up. Volume is heavy to 12s and 18s, light supplies of 24s and very few 30s and 36s, however improving. Demand expected to remain strong and prebooking is strongly recommended. Quality remains excellent with uniform sizing and tight compact heads.

## ASPARAGUS

Eastern Washington is now in full swing and is the primary district with good availability and steady prices.

## AVOCADOS

The avocado market is generally stable. FOB prices in Texas adjusted upward on 60s and smaller, while 48 and larger remained stable. 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.

## BELL PEPPERS

Demand exceeds supply on green bell peppers in the West as a production gap has developed, with limited supplies for both old crop in Coachella and new crop in the San Joaquin Valley. Availability is tight in the East during the harvest transition from Florida to Georgia. 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 supply of red bells.

## BLACKBERRIES

Producing regions: Central Mexico, Santa Maria, Watsonville, Salinas, Georgia, North Carolina, Oxnard. Weather is favorable in most areas. No impacts on production are expected this week. Quality is good overall. Primary availability on blackberries is mostly out of northern CA and Santa Maria. Organics available, supplies are increasing. Sugar levels measure 12 to 13 Brix.

## BLUEBERRIES

Producing regions: Georgia, California, N. Carolina, Baja, Central Mexico. Weather is favorable in most areas. No impacts on production are expected this week. Quality is good overall. East Coast production increasing. West Coast production decreasing. Short, temporary gap expected between California and Pacific Northwest season. CA production of organic is decreasing while NC has started packing 6 oz. Sugar levels are elevated, ranging from 14 to 18 Brix.

## BROCCOLI

Below average supplies. Quality remains consistent with a good green color, small to medium bead size and uniform sizing with an occasional hollow core. Sizing will be smaller the first part of the week and crowns will be limited. There is a wide range in the market depending on growing area and supplies.

## CANTALOUPE

Market steady and strong on all sizes as we are in a slight 5-7 gap out of the California desert and the Arizona desert is getting hit heavy due to the gap which is really strengthening the market overall quality and sugar are good. You will see a full slip and a green to straw cast and excellent internal color. The overall netting is a little rough but fruit is very strong. Expect us to continue out of the desert until the end of June and should have a smooth transition to the Westside. Quality is very good: sugar levels range from 11 to 12 Brix.

## CARROTS

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

## CAULIFLOWER

Below average supplies. Covering contracts only. Though market prices have softened, this trend should not continue.

## CELERY

Supplies available in Oxnard with fair quality. Color is good and stalks are meaty. Case weights are lighter (50-52 lbs.), however, due to dehydration from heavy winds. Demand and market remain steady. Salinas' celery will start in June.





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## CILANTRO

Steady supplies this week but expected to decrease next week. Quality is good with 10-12" in length with good green color.

## CUCUMBERS

Prices are beginning to ease from recent highs, as harvest volume increases in Georgia and Baja California, with continued late-season in Northern Mexico.

## FENNEL/ANISE

There will be a gap in production this week in Salinas and contracts are being cover as much as possible. The market should be very active this week with no harvest and light supplies available from last week.

## 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

Market is steady on reds and fairly firm on greens as we are slowly getting better numbers each day on sugarones. The overall quality of both colors is very good with nice firm fruit and excellent sugar content. The movement has been very good and expect prices to stay fairly steady as we are short about 30% of our overall volume on greens out of Mexico. We will have a smooth transition from Mexico/Coachella to the central Valley around the end of June as we are about 2 weeks ahead of schedule here in the valley. Our crop up here has a nice set and barring any major weather problems we should have some excellent fruit to take us through December. 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. Harvest volume is increasing for new crop beans in Georgia, and prices have dropped to reasonable levels.

## GREEN CABBAGE

Good supplies with medium sizing. Pricing is moderate and expected to continue as such. With additional regional programs beginning along with minimal production, any strong changes in the market are not expected.

## GREEN ONIONS

Ample supplies for the next few weeks with excellent quality and medium sizing. Iceless packs are available with very aggressive pricing.

## HONEYDEW

Market very strong with light supplies out of Mexico and California Arizona Desert, the overall quality is excellent with a green to cream exterior and excellent internal color and sugars. Expect market to keep steady and possibly ease off a bit in the next week as the Arizona production increases. We again should have a smooth transition around the end of June to the Westside and overall volumes on the Westside are a little lighter than last year. Quality is very good: sugar levels range from 11 to 13 Brix.

## ICEBERG LETTUCE

Light supplies continue in Salinas this week. Quality is good with firm heads, good green color and desired weights. 30s are limited in supply. Amount of supplies (light or normal) depends on shipper. Prices are expected to be steady.

## 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 14-16" and dark green color. Demand has softened resulting in lower market pricing.

## 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 is very strong and demand is phenomenal, the overall quality is good to fair with some of the dist. 2 fruit showing heavier maturity which is causing a few issues but for the most part things are moving and we are not having to store the fruit for later in the season.



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The outlook for the summer is that we will see some very tight supplies and prices will continue to climb each week about 1.00-1.50. We are hoping to start dist. 3 (desert) about 2-3 weeks earlier than normal which will hopefully allow us to not have a shortage of fruit like we experienced last year. Flavor is tart; sugar levels range from 6 to 8 Brix.

## LETTUCE (GREEN & RED LEAF)

Drastically short supplies continue on 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

Lime market is changing. Large limes 150s and larger remain tight. While 175s and smaller are much more available. Prices continue to decline from recent extremes. Mid \$30.00s is expected by June 15th.

## NAPA

Tight supplies for growers in Central California.

## ONIONS

The market remains steady on all colors and sizes this week. The Imperial Valley in Southern California is winding down and both Southern New Mexico and the San Joaquin Valley are starting up. Supplies remain heavy to a smaller size profile in Texas that is peaking on Medium Yellows, 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; please place orders as early as possible.

## ORANGES

Market is strong with good demand on all sizes and overall quality is excellent with good internal and external color and sugar. We should be finished with navels by the end of the month and we are going strong with Valencia's as well which will take us through the summer months. Expect prices to keep steady and then start to ease up around the end of July as we want to get the fruit off the tree and try to save next year's crop that is hanging as well. We are all very concerned about the water and if we do not receive some heavy early rains we are going to be in trouble for next year. Just an FYI there is 13,000 acres of oranges being torn out as of right now due to the water situation. Sugar levels range from 11 to 12 Brix.

## PARSLEY (CURLY)

Lighter supplies this again this week as is the case industry wide. Overall quality and appearance remains nice with bunches averaging 9-10 inches in length and showing dark green color. Market prices continue to rise.

## PARSLEY (ITALIAN)

Plentiful supplies this week. Overall quality and appearance continues to be very nice with 10-12" in length with dark green color. Prices remain high.

## PINEAPPLES

Currently, 5s and 7s are the tight sizes with better availability on 6s and 8s, although there is some relief on 7s this week. Flavor is tangy, yet sweet with tropical undertones: sugar levels range from 13 to 14 Brix.

## POTATOES (IDAHO)

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. 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

Producing regions: Central Mexico, Baja, Oxnard, Watsonville, Santa Maria. Weather is favorable in most areas. No impacts on production are expected this week. Availability: 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

Stronger supplies this week with improving yields and weights. Prices have begun to decrease to moderate levels.

## ROMAINE HEARTS

Average supplies with continued strong demand. There are occasional cracked ribs and some heads a bit leafier than normal. Otherwise, lengths are uniform (10-11") with weights of 24-26 oz. on a 3 count bag.

## ROMAINE LETTUCE

Average supplies with continued strong demand. Weights are 35- 37 lbs. per case with each head measuring 10-12" in length. Occasional minor fringe burn, misshapen heads are present, but not appearing on every head.





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## **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)**

Higher yields are attributing to elevated supplies. Demand is good and the market is steady. Quality is excellent with large and full bunches measuring 10 -12". Color is a strong green with pack weights of 20-22 lbs.

## **SPRING MIX**

Steady availability with minimal effects from the heat wave that occurred in mid-May.

## **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 (ZUCCHINI & YELLOW)**

Prices are on the decline from recent highs, with new districts coming into production in Georgia and Central California, supplementing continued availability in Florida and Nogales.

## **STRAWBERRIES**

Producing regions: Central Mexico, Baja, Santa Maria, Watsonville, Salinas. Product quality is maintaining with growers' hard work. Oxnard production has finished (fruit available for loading through weekend). Baja and Central Mexico will finish in the next week. Organic volume will continue to increase each week (primarily Watsonville/Salinas). Sugar levels range from 14 to 15 Brix.

## **TOMATOES**

### **EAST**

**Rounds:** FOB prices are up again this week as the gap situation continues and the weather pattern has changed bringing many more afternoon showers. The Ruskin/Palmetto region continues to harvest but yields have decreased. We look for Quincy to begin harvesting this weekend with light volume. We expect yields to be down this year from the Quincy and South Georgia crops due to earlier rains. However we see the quality from these fields to be good. The quality from the current fields is good

to very good. We see this market continuing for another week or two. At that time the market should begin to fall as volume starts coming from the SC and Arkansas crops. Light volume is currently coming out of the west also.

**Romas:** Roma market up as supplies decrease. Quality remains very good.

**Grapes:** Grape supply is beginning to get a little tighter for the first time since the end of March. FOB prices up. We look for the grape supply to continue to decrease as our SC crop is about 2 weeks behind due to earlier wet and cool weather. Current quality remains very good.

**Cherries:** Like grapes, supplies are down this week. FOB prices are up and showing signs of strengthening more. Quality continues very good.

## **WEST/MEXICO**

**Rounds:** A few Nogales crossings continue but quality is suspect. Light volume is also crossing at McAllen. Otay Mesa crossings continue to increase with variable quality. California growers will start harvesting the 2nd and 3rd week of June.

**Romas:** Nogales, San Diego and McAllen crossings continue. Quality is variable from shipper to shipper but very good quality can be found. Prices have risen slightly above the suspension agreement minimums for the first time in many weeks.

**Grapes:** Continue 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 continue to cross at Baja with light volume.

## **TREE FRUIT**

Good supplies on peaches and nectarines. Northwest cherries will be starting within the next week or two. Black plums (Red Flesh) Black Splendor are in good supply of large sizes. Quality is good: sugar levels range from 9 to 10 Brix.

## **WATERMELON**

Prices have eased slightly following Memorial Day, however with the season finishing in Mexico in early June, the market will continue to be well supported through the month of June. Quality is good: fruit is firm and sweet. Sugar levels range from 12 to 14 Brix.