

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending June 13, 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, but are improving. Prices remain very active for California iceberg lettuce for late week shipments, the result of reduced yields following 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	Moderate to 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	Moderate	Good	↓
Iceberg Lettuce	High	Excellent	↔
Romaine Lettuce	Moderate	Good	↔
Romaine Hearts	High	Good	↔
Cucumbers, Green Beans	High	Good	↔
Green Bell Peppers	High	Good	↔
Red Bell Peppers	Moderate	Good	↑
Yellow Squash, Zucchini	Moderate	Good	↔
Green Seedless Grapes	High	Good	↓
Peaches, Nectarines	Moderate	Good	↔
Red Seedless Grapes	Moderate	Good	↔
Cantaloupes	High	Good	↑
Honeydews	Moderate	Good	↔
Artichokes, Cauliflower	High	Excellent	↔
Spinach (Bunched)	Low to Moderate	Excellent	↓
Arugula, Celery, Frisee	Moderate	Fair	↔
Bok Choy, Carrots, Baby Spinach, Spring Mix	Moderate	Good	↔
Parsley (Curly)	Moderate to High	Good	↑
Parsley (Italian)	High	Very Good	↓
Fennel/Anise	Moderate	Very Good	↔
Asparagus, Peeled Garlic, Mache, Napa, Snow & Sugar Snap Peas	High	Good	↔
Green & Red Cabbage	Moderate	Excellent	↔
Broccoli, Green Onions	Low to Moderate	Good	↔
Cilantro	Moderate to High	Good	↔
Kale (Green)	Low	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. Sugar levels measure 12 to 14 Brix. 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 range from 12 to 14 Brix.

ARTICHOKES

Production remains steady; however, strong demand is keeping supplies limited. Pricing remains high but steady from last week on 12s, 18s and 24s. Looking ahead, a better variance in total sizing with improved numbers on the 24-36 category is expected. Quality is very good with tight, compact head shape and good consistent green color.

ARUGULA

Moderately tight availability.

ASPARAGUS

Good availability and steady prices in Eastern Washington.

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. Eating quality on Mexican late-season and California mid-season avocados are both excellent. Avocados from Peru have arrived and are available through September.

BELL PEPPERS

East: While the supply of other dry vegetable commodities have increased this week as more fields begin to harvest, bells remain a hot-ticket item with strong demand chasing limited supplies. Central Florida is at the very end of their crop with variable quality. North Florida/South Georgia fields are coming on with more volume but are below normal yields. As expected, prices for red bells have advanced, as growers harvest early (prior to

turning color), selling as green peppers in order to take advantage of current high prices for green bells; thereby reducing the supply of red bells.

West: Extremely limited supplies as we transition. FOB prices remain high as demand chases limited supply. Most supplies are now coming from Coachella.

BLACKBERRIES

Producing regions: Santa Maria, Watsonville, Salinas, Georgia, North Carolina, Baja, Oxnard. Weather is mostly clear and favorable weather in most areas. Georgia is expecting thunderstorms back half of this week, impact on production is not expected during this time. Quality is good overall. Availability out of Georgia, expecting volume to increase week over week. For the next two weeks availability is expected to be tight on CV and Organic on the West Coast due to gap in production, with Central Mexico stopping production this week. Sugar levels are average, ranging from 12 to 13 Brix.

BLUEBERRIES

Producing regions: California, North Carolina, Baja. Weather is favorable in most areas. Impact on production is not expected this week. Quality is good overall. East Coast production continues to increase and has availability. A short, temporary gap is expected between the California and Pacific Northwest season. Organic, California production is decreasing while NC has availability. Quality is very good: berries are slightly floral and sweet. Sugar levels measure 14 to 18 Brix.

BLUEBERRIES

Steady availability.

BROCCOLI

Steady production continues. Broccoli varieties are producing consistent medium bead sizing with nice green color and minimal purple casting. Current pricing is moderate and a few dollars more for crowns.

CANTALOUPE

Market extremely tight and strong with a demand exceeds supply situation out of the Arizona and California deserts, and we will see this situation for the next 10-14 days. There will be some heavier volumes around June 20th through July 4th, which will help us bridge the gap between there and the Westside. The volumes out of Bakersfield are way down due to the water situation, but the Westside will have close to last year's volume, just using more well water which will probably create some smaller sizes. Quality is very good: sugar levels range from 11 to 12 Brix.



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CARROTS

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

CAULIFLOWER

Improved yields this week. For the past few weeks, the changes in weather have reduced the yields significantly; most shippers appear to have lighter supplies this week. Most of the cauliflower is very nice with some slight discoloration from short leaf jacket in some fields.

CELERY

Average supplies this week. Demand is slow and market is steady. Quality is fair (some appearance of leaf miner in most heads-insect damage) and color is strong with meaty stalks. Quality is expected to improve next week. Sizing is normal with weights ranging 53-54 lbs. Oxnard growing region is near completion. Salinas starts on Monday.

CILANTRO

Slightly lower supplies this week and about the same is expected for next week. Quality is good with 9-11" in length with good green color.

CUCUMBERS

East: Supplies are increasing as we started harvesting our NC fields yesterday while product still being picked in GA and SC. FOB prices are responding accordingly.

West: Quality is extremely variable from grower to grower with pricing reflecting the quality. Crop continues in transition as more volume is crossing at Otay Mesa.

FENNEL/ANISE

There is a gap in production this week in Salinas and contracts are being covered as much as possible.

FRISÉE

Adequate supplies.

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

Market fairly steady with good supplies of 40's and larger and 48's and smaller extremely tight. The overall quality of the Desert fruit is excellent with great interior and exterior color.

GRAPES

Market is very good with excellent demand out of Mexico and Coachella. Started moving fruit 2 weeks earlier than normal, and with the excellent quality out of both areas fruit is flying off the shelf. Expect the market to keep strong as we are going to experience some extreme heat this Friday through Monday, which will slow down packing and we will see if any damage is done. We are expecting to start in the central valley towards the end of this month which is about 10 days earlier than normal. We will have good supplies out of the valley through December. Sugar levels are 18.5 Brix.

GREEN BEANS

Good availability in the Georgia, continued tight supplies and high prices in California.

GREEN CABBAGE

Green cabbage production is stable and quality has greatly improved with increased weights and supplies.

GREEN ONIONS

Ample supplies for the next few weeks with good quality and great green color.

HONEYDEW

Market is very strong with excellent demand out of Mexico, California, and Arizona deserts. The overall quality is excellent with a green to cream exterior, interior color is excellent, and sugars are great. Expect the market to keep steady as demand continues and volumes keep steady. We expect to get started on the Westside around the first week of July and carry through October. Quality is very good. Sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Overall volume industry-wide is a bit below normal. Quality is excellent with firm heads, good green color and weights at a desirable level. Demand this week has been steady, but transportation (trucking) has slowed any increase in the market. Average volume is expected for another week and demand will determine any advances in the market.

JALAPEÑOS

East: Harvesting both out of FL and GA with the GA market demanding higher FOB prices. Quality is good.

KALE (GREEN)

Very good supplies this week in Salinas Valley. Overall quality and appearance is very nice with bunches and lengths measuring 10-12" 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 is very strong with a demand exceeds situation on all sizes. The overall quality of the fruit is good to fair with some higher maturity fruit showing some soft and high yellow color. The overall market will continue to climb as we are moving at a faster rate than expected and the Chileans will send some fruit, but with demand around the world being so good they are likely to send less to the USA. Expect 1-2.00 jumps in price across the board until the demand starts to ease. We hope to not have a similar situation occur as we did last summer and early fall, we are hoping to start dist. 3 (Desert) about 2-3 weeks early around the first of Sept. Quality is very good. Flavor is tart: sugar levels range from 6 to 8 Brix.

LETTUCE (GREEN & RED LEAF)

Availability has improved and prices are trending lower. Seeders are present in many samples. Carton weights range 20- 24 lbs.

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

Light supplies.

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, 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; please place orders as early as possible.

ORANGES

Market steady with good demand and good supplies on most all sizes. We are still packing navels but predominantly Valencia's which will carry us through the summer.

We will have good supplies of Valencia's through July, and then we will start to see things get a little stronger as most growers are wanting to get the fruit off the tree in order to relieve some pressure off the tree and next year's crop that is hanging on. The water situation is what will dictate next year's situation. If we do not get any major storms late fall to help re-charge the ground water, we will have some major problems on next year's crops. 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 8-10 inches in length and showing dark green color. Market prices continue to be high due to limited availability.

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. Prices are expected to fall with better availability industry wide.

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 notes: 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. It is suggested that 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: Baja, Oxnard, Watsonville, Santa Maria. Weather is favorable in most areas. Impact on production is not expected this week. Quality is good overall. Availability will continue to be strong on Conventional and Organic raspberries through the month of June. Central Mexico to stop production this week. Sugar levels are high, ranging from 13 to 14 Brix.

RED CABBAGE

Strong supplies this week with heavier weights than anticipated. The market is steady and quality is very nice.



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ROMAINE HEARTS

Average supplies with good demand. Quality overall continues to be good with light green color. Most heads are uniform in size and some slightly leafier than normal, otherwise expect uniform lengths of 10-11 inches with weights in the 25 oz. range on a 3 count bag.

ROMAINE LETTUCE

Steady supplies with a decrease in demand from the last several weeks. Part of the reasoning is the availability of transportation and the beginning of several eastern growing areas. Quality and condition are good, color is dark green and lengths are in the 11-13" range. Carton weights are 36-37 lbs.

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)

Yields are significantly higher this week (warmer temperatures both day and night). Demand is slow and market is softening each day. Quality is excellent with large and full bunches measuring 11-12". Color is a dark green and carton packs weigh 20-22 lbs.

SPRING MIX

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

SQUASH (YELLOW)

East: Supplies are coming on strong as we begin to harvest fields in GA and SC. FOB prices have dropped again this week as supplies continue to increase. Quality is fair due to winds (scarring) and rain but is improving.

West: Squash continues in transition but supplies are increasing. Quality is good.

SQUASH (ZUCCHINI)

East: Similar to the yellow squash but even more supplies are coming on-line and the FOB prices are responding accordingly. Quality is good.

West: Same as yellow.

STRAWBERRIES

Producing regions: Santa Maria, Watsonville, Salinas. Weather is favorable in most areas. Impact on production is not expected this week. Quality is good overall. Wat-

sonville/Salinas will continue to be the majority player for production, while Santa Maria will gradually decline. Organics, currently in high volume. Availability is tightening for growers of non-proprietary variety strawberries. Prices have rebounded as product is diverted to the freezer processors. Sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: FOB prices are up again slightly this week on all sizes as the week marks the height of the gap situation about which we have been informing you. The Ruskin/Palmetto region is winding down with much lower volume. Also, as reported last week, the weather pattern has changed bringing much cloud cover and showers to the growing region. This has caused quality out of FL to be less than good for the first time this year. Fortunately, new crops are starting up which will bring more supply and better quality. Quincy will begin to harvest Wednesday or Thursday of this week and our SC fields will begin to be harvested Monday or Tuesday of next week. Subsequently, we look for prices to decline after next week.

Romas: Roma market is generally stable but up slightly. Quality is good.

Grapes: The grape supply is reaching a critical level due to the gap situation. Our SC crop is normally going strong by now but rainy and cold weather in the early spring delayed plantings and slowed growth. FOB prices are up substantially. Fortunately, our SC crop should start up very soon which should abate this low supply and high price situation by the following week. Current quality remains good.

Cherries: Like grapes, supplies are down and are close to critical. FOB prices are up sharply. Quality continues good.

WEST/MEXICO

Rounds: Nogales crossings too few to create a market. Quality is poor. Otay Mesa crossings continue to increase with variable quality. Some California growers started harvesting this week while others will begin within the next two weeks.

Romas: Nogales, San Diego and McAllen crossings continue. Quality is variable from shipper to shipper but very good quality can be found. Prices from all western growing regions are up slightly this week.

Grapes: Grapes continue to cross at Baja. Quality is good. Decreased volume nationwide has caused a shortage of supplies causing FOB prices out of Otay Mesa to increase substantially.



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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

(PEACHES, NECTARINES, PLUMS, CHERRIES)

The California cherry harvest is in full swing and prices have dropped substantially. Yellow and white peaches, black plums, apricots, and nectarines are all in good supply. Sugar levels range from 12 to 13 Brix.

WATERMELON

Prices have declined to reasonable levels following Memorial Day. Nogales will be finished by mid-June, however regional growing areas are expected to be in production soon. Demand will increase as we approach the July 4th holiday selling period. Quality is good: fruit is firm and sweet. Sugar levels range from 12 to 14 Brix.