

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending June 20, 2014

MARKET OVERVIEW

Prices have decreased for many leaf items and mixed vegetables with fair to good quality. Prices for California romaine have eased in response to lighter demand, as new crop is now available from New Jersey and Eastern Canada. The avocado market is generally stable. Demand and quality remain good on most citrus items. The Idaho potato market continues to soften. Market is very unstable.

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	Moderate	Good	↑
Blueberries	Moderate to Low	Good	↔
Blackberries	Moderate to High	Good	↔
Strawberries	Low	Good	↑
Raspberries	Moderate to Low	Good	↔
Grapefruit	Moderate	Good	↑
Lemons	High	Good	↑
Oranges, Navels, Valencias	High	Good	↔
Limes	Moderate	Good	↓
Pineapples	Moderate	Good	↔
Green, Red Leaf Lettuces	Moderate	Good	↓
Iceberg Lettuce	Moderate	Good	↓
Romaine Lettuce	Moderate	Good	↓
Romaine Hearts	High	Excellent	↔
Cucumbers, Green Beans, Green Bell Peppers	High	Good	↔
Red Bell Peppers	Moderate	Good	↑
Yellow Squash, Zucchini	Moderate	Good	↔
Green & Red Seedless Grapes	Moderate	Good	↔
Peaches, Nectarines	Moderate	Good	↔
Broccoli	Moderate	Good	↑
Cantaloupes	High	Good	↔
Honeydews	Moderate	Good	↔
Artichokes	High	Excellent	↔
Spinach (Bunched)	Low	Good	↓
Arugula, Frisee	Moderate	Fair	↔
Bok Choy, Carrots, Baby Spinach, Spring Mix	Moderate	Good	↔
Cauliflower, Parsley (Curly & Italian)	High	Fair	↓
Celery	Low	Excellent	↔
Fennel/Anise	Moderate	Very Good	↔
Asparagus, Peeled Garlic, Mache, Napa, Snow & Sugar Snap Peas	High	Good	↔
Green & Red Cabbage	Moderate	Excellent	↔
Green Onions	Low to Moderate	Good	↔
Cilantro	Moderate	Fair	↓
Kale (Green)	Low	Fair	↓
Red Onions	Low to Moderate	Good	↔
White & Yellow Onions	Moderate	Good	↔
Potatoes	High	Good	↑
Round, Roma, Plum, Cherry, Grape Tomatoes	High	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 113s and smaller still in tight supply. Export demand has slowed but still active. Prices are stable. 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

Tight supplies with strong pricing on artichokes this week. Production remains good. Market is basically steady on 12s, 18s and 24s. The market on 30s is expected to inch up this week due to lack of 24s. Quality remains excellent with good green color and tight, compact head shape.

ARUGULA

Moderately tight availability for both conventional and organic. Quality issues continue as the result of the heat wave that occurred during mid-May, and the cool, humid conditions that have followed.

ASPARAGUS

Steady availability from Washington and Peru.

AVOCADOS

The avocado market is generally 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. Avocados from Peru have arrived and are available through September. Oil content is high, creating nutty flavor and creamy texture.

BELL PEPPERS

Green bell peppers continue to be in tight supply, with the Southern San Joaquin Valley now the primary district. Production volume in the East has yet to reach meaningful levels; North Carolina volume is expected to increase, which will bring some relief to the current shortage. Prices continue to advance for red bell peppers in Coachella, 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.

BLACKBERRIES

Producing regions: Santa Maria, Watsonville, Salinas, Georgia, North Carolina, Baja, Oxnard. Georgia is expecting afternoon showers this week; a large impact on production is not expected during this time. Cooler temps and overcast conditions experienced over the last 8 days in California has slowed growth of blackberries; cold weather impacts the maturity of the fruit. Weather will remain cold and should warm up over the weekend and into next week. Quality is good overall. Sugar levels are average, ranging from 12 to 13 Brix.

BLUEBERRIES

Producing regions: California, North Carolina, Baja. Cooler temps and overcast conditions experienced in Northern California can potentially delay fruit ripening. Quality is good overall. While East Coast production continues to be increasing, this week California is even and cannot take on additional business. West Coast has organic availability, but East Coast does not have availability this week. A short, temporary tap is expected between the California and Pacific Northwest season. Quality is very good: berries are slightly floral and sweet. Sugar levels measure 14 to 18 Brix.

BLUEBERRIES

Steady availability.

BOK CHOY

Steady availability.

BROCCOLI

Some varieties are producing slightly uneven bead sizing with knuckled appearance and some lighter color underneath the clusters. Production volumes are estimated to be down for the next two weeks. Industry supplies are a bit lighter for the week thus there is some advancement in FOB pricing.

CANTALOUPE

Market is very strong on all sizes as the volumes out of the Imperial Valley and Yuma are very light and most of the volume is coming out of the Arizona region at this point. There will be some new blocks breaking next week in the Imperial Valley that should help ease the market a bit, but there is very little volume in Huron and Bakersfield compared to last year, so the transition from the desert to the Valley around the first of July might be a very tight market for the first 7-10 days until more volume starts on the Westside. The overall quality of the fruit is good with some uneven netting and some ground scar, but most of the fruit is very strong and eating excellent. Quality is very good: sugar levels range from 11 to 12 Brix.



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CARROTS

Plentiful supplies in California. Steady availability in Texas (Mexico) and Georgia.

CAULIFLOWER

Increased volume will continue all of next week. Currently, the market is showing strength however, pricing may drop moving closer to the weekend. Quality is fairly good, but the heat has had some effect on the curds resulting in off color, occasional yellow cast and spreading.

CELERY

The first celery harvest of Salinas is very nice with very light insect damage in some stalks. Quality is excellent featuring a strong green color, good meaty shanks and weights ranging from 57- 59 lbs. Demand is slow with low prices.

CILANTRO

Volume is down this week due to low yields and expected to continue into next week. Quality is good with 9-10" in length with good green color.

CUCUMBERS

Tight supplies in Georgia and Baja California, with Nogales finished by mid-June, earlier than normal (due to hot weather in Northern Mexico). Prices remain firm for Baja California cucumbers (shipped from San Diego), with continued below average yield. The market has begun to ease in the East, as production has begun to increase for growers in Georgia and North Carolina.

FENNEL/ANISE

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

FRISSEE

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 very strong on reds as most growers are coming up shorter than anticipated and also the high heat is slowing down harvesting as well. The green market has eased off a bit and some of the greens have been hurt due to the high heat and therefore we will see lighter supplies in the next week which could spark up the green market. We are anticipating starting in the central valley around the end of this month and possibly by the 20th of June depending on weather. We are anticipating a very nice crop here in the central valley on all colors barring any major weather problems and will have good supplies going through November. Sugar levels are approximately 18.5 Brix.

GREEN BEANS

Good availability in North Carolina, prices have advanced in Georgia. Availability has improved slightly for premium quality (first grade) beans in California, although prices remain high.

GREEN CABBAGE

Green cabbage production is stable and quality is excellent. Weights are 45-50 lbs. The market is softer on demand due to some of the regional areas starting up.

GREEN ONIONS

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

HONEYDEW

Market is very strong due to good demand and lighter supplies out of the desert regions and Mexico. Expect the market to keep strong as demand is very good and overall quality is excellent, with good sugars and a green to cream cast and excellent internal color. We are anticipating starting in the central valley around the end of next week in a very light way and then the heavier volumes will start on the Westside around the third week of July. We expect normal volumes through the summer months until we transition back to the desert around the middle of October. Quality is very good: melons are sweet. Sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Volume is slightly above average after warm temperatures from the weekend. Prices are expected to decrease by the weekend. Case weights are climbing to 42-47 lbs., and overall quality and condition should be fairly good with medium to medium plus head size.



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JALAPEÑOS

East: Harvesting both out of FL and GA. FOB prices down in GA. Quality is good.

KALE (GREEN)

Very good supplies this week in Salinas Valley. Overall quality and appearance is fair with bunches and lengths measuring 14-16" and dark green color.

KIWI

Tight availability. 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 tight with demand exceeding supply on most sizes. The overall quality is fair, with some mature fruit and some heavily scarred fruit making it in the carton under these tight conditions. The overall juice content is good and we expect the market to keep strong through August as we battle the supply issue. The Chilean fruit will start to arrive around the first week of July which we hope will help ease the situation. The Chileans however might send more fruit to the Pacific Rim and other countries due to the overall world shortage at this time and not send the anticipated volumes to the States. Quality is very good. Flavor is tart: sugar levels range from 6 to 8 Brix.

LETTUCE (GREEN & RED LEAF)

Plentiful supplies; quality is improving as growers move into summer varieties. Prices are trending lower.

LIMES

175's are now averaging \$15.00 FOB, 200's averaging \$10.00 FOB, and 230's averaging \$8.00 FOB.

NAPA

Light supplies.

ONIONS

No spikes in pricing expected as they come from California, New Mexico and Texas. Although most shippers have finished in TX because of quality and sizing issues.

ORANGES

Market is strong with good demand on all sizes and grades. The overall quality is very good with great juice content and good sugars. Expect market to keep steady and then start to ease upward around the end of July as some packing houses finish up. We are all trying to relieve the tree from this year's crop so it can keep next year's crop alive with minimal water. We will go through

the middle of October and expect to have an early start to California navels around the third week of October. Sugar levels range from 11 to 12 Brix.

PARSLEY (CURLY)

Volume, quality and price continue to be steady. Bunches are measuring 8-10" in length with good green color.

PARSLEY (ITALIAN)

Plentiful supplies this week. Overall quality and appearance continues to be outstanding 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. Quality is very good: flavor is tangy, yet sweet with tropical notes. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Market conditions are the same on all counts and US #2's. Pricing has leveled off this week and actually fallen toward the end of this week as there seems to be a balance between supply and demand. Although the #2 market has strengthened. Truck rates likely to climb due to the competing needs from California.

RASPBERRIES

Producing regions: Baja, Oxnard, Watsonville, Santa Maria. Cooler temps and overcast conditions experienced over the last 8 days in California has slowed growth of raspberries. Weather will remain cold and should warm up over the weekend and into next week. Quality is good overall. This week, availability is limited on CV and OG due to Baja and Oxnard declining faster than originally anticipated. Expect next week to see stronger production. Next week, availability will continue to be strong on conventional and organic raspberries through the month of June. Sugar levels are high, ranging from 13 to 14 Brix.

RED CABBAGE

Strong supplies are expected for the next 10 days with improved yields producing large, full heads. The trend is expected through the next few weeks while market pricing remains moderate.

ROMAINE HEARTS

Average supplies with very good demand. Quality overall continues to be very nice with light green color and uniform cupping. Weights in the 25 oz. range on a 3 count bag with lengths of 11-12".



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ROMAINE LETTUCE

Supplies are very steady this week. Demand is also steady and prices are low to moderate. Color and condition are very good with light amounts of fringe/tip burn due to high temps over the past weekend.

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.

SPINACH (BUNCHED)

Average supplies this week with slow demand results in a weak market. Overall quality features large and full, solid green bunches, measuring 10-11" in length with some light wilt present in bunches; carton weights range 20-22 lbs.

SPRING MIX

Good supplies. Prices are steady. Quality is very good: organic arugula and spinach quality has returned to normal. Maintaining the cold chain is critical to shelf-life.

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: 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 close to minimums. Quality is good.

West: Same as yellow.

STRAWBERRIES

Producing regions: Santa Maria, Watsonville, Salinas, Baja (OG only). Night time temperatures in Santa Maria have been rising in turn giving a narrow range between day time highs and lows which can negatively affect quality. Cool days, warm nights. Quality is good overall. Peak volumes are available for the next four weeks. Anticipate that with the peak starting earlier this season, production will decline sooner than anticipated as well. Santa Maria volume will decline going forward while Watsonville and Salinas will be primary loading areas. Organics, forecasted to increase week over week and available now. Quality is very good: berries are firm and sweet. Sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: FOB prices of medium and large sized tomatoes remain stable as the price of extra large tomatoes declined. All shippers are reporting lower than normal volume. They are cleaning up the fields around the Palmetto/Ruskin area where quality is suspect. Quincy and South GA continue to harvest. Our SC crop has begun to produce but will not be into full production until next week. Good volume out CA and AK will also begin next week. Subsequently, we look for prices to decline further after next week. Quality is very good: fruit is firm and juicy.

Romas: Roma market is generally stable. Quality is good.

Grapes: The grape supply is still tight with steady FOB prices. Our SC crop is normally going strong by now but rainy and cold weather in the early spring delayed plantings and slowed growth. Fortunately, our SC crop should start by early next week which should abate this low supply and high price situation by the following week. Current quality remains good.

Cherries: Supplies are down to the point where there is not enough of a market for the USDA to quote prices. FOB prices are up. Quality continues good.

WEST/MEXICO

Rounds: Nogales crossings too few to create a market. Quality is poor. Price of two layers crossing at Otay Mesa crossings up \$1 on the 5x5 and up \$2 on the 4x4. Four different shippers look to start up next week.

Romas: Nogales, San Diego and McAllen crossings continue. Prices down slightly on most sizes. Quality is variable from shipper to shipper but very good quality can be found especially at Otay Mesa.

Grapes: Grapes continue to cross at Baja. Quality is good. Demand is up causing FOB prices out of Otay Mesa to increase by \$1.50.

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 current size profile for white peaches is heavy to large sizes, not the smaller fruit that is preferred by foodservice customers. Steady availability on nectarines, and red and black plums. The apricot season is finished. The Washington cherry harvest is in full swing. Demand is very



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good, supplies plentiful. Quality reported as excellent. Prices are starting to level off. Sugar levels range from 12 to 13 Brix.

WATERMELON

Good availability from Florida have watermelon through the month of 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.