

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending June 27, 2014

MARKET OVERVIEW

Iceberg lettuce, romaine hearts, broccoli and cauliflower are the row crop vegetable items for which production is currently below average. Prices are moderate or are trending downward for many leaf items and mixed vegetables. Quality on average is very good. The avocado market is generally stable. Demand and quality remain good on most citrus items. Late season green seedless grapes are plentiful, with a smooth transition from the desert growing regions to the San Joaquin Valley of California.

California lemon shippers are shouting from the mountain tops that today's chaos will worsen and continue for at least another two months. Sunkist explains the problem is global, just not domestic. Argentina's production is down 60% from last year and Chile is down 50%. In California, the tonnage is about normal but the sizing is terribly small and the quality is below average. California's crop is suffering from a combination of the December 2013 freeze and the ongoing severe drought. The result is the California size profile is heavily slanted to 200s, 235s, then 165s. The freeze affected quality, which explains the abundance of standard grade fruit. The size profile will not increase with time because of the limited water availability. In a normal year ample water supplies not only hydrate the plants but deliver nutrients, which results in size growth.

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	Moderate	Good	↑
Blackberries	Moderate to High	Good	↔
Blueberries	Moderate to Low	Good	↔
Raspberries	Moderate to Low	Good	↔
Strawberries	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	Moderate to High	Very Good	↔
Cucumbers	High	Good	↔
Green Beans	High	Good	↓
Green Bell Peppers	Moderate	Good	↓
Red Bell Peppers	Extreme	Good	↑
Yellow Squash, Zucchini	Moderate	Good	↑
Green Seedless Grapes	Moderate	Good	↓
Red Seedless Grapes	High	Good	↑
Peaches, Nectarines	Moderate to High	Good	↔
Cantaloupes	High	Good	↔
Honeydews	High	Good	↑
Artichokes	High	Excellent	↔
Arugula, Asparagus, Bok Choy, Carrots, Broccoli, Cilantro, Baby Spinach, Spring Mix, Frisee	Moderate	Good	↔
Parsley (Italian)	Moderate to High	Good	↔
Parsley (Curly)	Moderate	Very Good	↓
Celery, Spinach (Bunched)	Low	Excellent	↔
Cauliflower, Fennel/Anise	High	Good	↑
Peeled Garlic, Mache, Napa, Snow & Sugar Snap Peas	High	Good	↔
Green Cabbage	Low	Good	↓
Red Cabbage	Moderate	Good	↓
Green Onions	Low to Moderate	Excellent	↔
Kale (Green)	Low	Very Good	↔
Red Onions	Low to Moderate	Good	↔
White Onions	High	Good	↔
Yellow Onions	Moderate	Good	↔
Potatoes	Low to Moderate	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 slower as schools closed for the summer and retail shelf space shrinks to make room for more seasonal stone fruit and grapes. Lower grades, 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

Good supplies continue this week. Volume is heavy on size 12s. Fair supplies of 18s and 24s will be available with very few 30s and 36s throughout the week. Small and large loose are extremely tight. Quality is excellent with consistent sizing and tight compact head shape. Prices are expected to remain higher for the next 7-10 days.

ARUGULA

Quality has improved.

ASPARAGUS

Mexico and Peru are now the primary growing regions. Prices are steady; the California season will end over the next 7 to 10 days. Quality is very good: stalks are straight and flavor is mildly grassy.

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

BELL PEPPERS

Prices for green bell peppers have dropped to normal levels in the East and West, as harvest volume has increased in the Southern San Joaquin Valley of California and Georgia. We are experiencing a gap in supply for premium quality red bells; the late season harvest in Coachella is heavy to fair quality (small size and fair appearance). New crop red bells will be available in the

Southern San Joaquin Valley in late June and in good supply by early July. East: FOB prices continue to fall due to slightly increased supplies. We have started harvesting our eastern NC fields. Due to the excessive heat, we look for the north FL/south GA region to wrap up soon. Quality out of NC is better than what has been coming out of GA due to better growing conditions. Red Bells remain extremely tight in all growing regions.

BLACKBERRIES

Producing regions: Santa Maria, Watsonville, Salinas, Georgia, North Carolina, Baja, Oxnard. Quality is good overall. Overcast conditions in CA have slowed growth of blackberries, cold impacts the maturity of the fruit. Weather will remain cold and should warm up over the weekend and into next week. Georgia and N. Carolina are the places to be this week with availability in both locations. There is not an option to load out of New Jersey with transferred fruit in from Georgia. California demand continues to be strong while light in production on CV and OG. Expectation is tight and challenging through the end of this week. Sugar levels are average, ranging from 12 to 13 Brix.

BLUEBERRIES

Producing regions: California, North Carolina, Baja, Oregon, Washington, New Jersey. Quality is good overall. Cooler temps and overcast conditions experienced in Northern California can potentially delay fruit ripening. Weather should warm up to help release the remaining fruit off next week. East Coast production continues to increase. NC is winding down while NJ should be coming on the back half of this week. Oxnard and San Joaquin Valley expected to end this week. PNW is scheduled to start middle of this week and first harvests are expected by Monday. OG, West Coast availability, East Coast does not have availability this week. 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

Supplies have tightened up once again on both bunched product and crowns. Supplies have been shifting week to week between growers and shippers. Bunch sizing is ranging from 2-3 per on 14s. Stalk size is averaging 25-50 cent diameters. Many samples continue to show up very branchy, knuckly and some hollow core. Overall quality has been good with some cat eye and purple cast.



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CANTALOUPE

Market is steady to strong especially on 9's and 12's coming out of Arizona and the California desert which will run through the month. We have started out of the central valley (Westside) in a light way, but expect to have better volume starting the middle to end of next week which should help ease the market a bit. The overall quality of the desert fruit is very good and we are experiencing some cooler than normal weather now, but looking towards the weekend and first of next week we will be back to normal which should bring things on at a good pace on the Westside. Quality is very good: sugar levels range from 11 to 12 Brix.

CARROTS

Steady availability in California, Georgia and Texas (Mexico).

CAULIFLOWER

Very light supplies this week due to erratic weather and improved demand. Quality and condition are very good with some rough curd and yellow cast showing up occasionally. Color ranges from cream to off white. Green jacket leaves are strong and weights are ranging from 25-32 lbs. on 12s depending on shipper and field location.

CELERY

Above average supplies for the next several weeks. Salinas's celery is showing some very light insect damage, case weights 57-58 lbs. with dark green color and meaty shanks. Demand is slow and quality is very nice.

CILANTRO

Volume has continues to be light; however normal supplies are expected as early as tomorrow. Quality and appearance continue to be nice with bunches averaging 9-11 inches in length with good green color.

CUCUMBERS

Availability is improving in the East (Georgia, North Carolina) with continued tight supply in San Diego (Baja California). Nogales (Northern Mexico) will be finishing this week. Overall production will increase by late June, as additional growing regions begin harvesting in the East.

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 is very strong on reds as we are finishing in Mexico and Coachella and starting in a light way in the central valley and will ramp up volume by the middle of next week in the valley. The green market is a little softer as there are better numbers crossing from Mexico and also Coachella. The overall quality out of all areas is all over the board as some of the greens are showing sunburn or discoloration due to the extreme heat that we had in the southern areas in the past 2 weeks. The central valley will have both colors by the end of next week and we should have some excellent quality through November. We had an excellent set on all varieties here in the valley and are expecting good overall crop. Sugar levels range from 17 to 18 Brix.

GREEN BEANS

Good availability in Georgia and North Carolina. Availability continues to improve for premium quality (first grade) beans in California, with prices slowly easing from the highs.

GREEN CABBAGE

The green cabbage market price is decreasing due to local/regional grown cabbage appearing on the market. Volume will remain strong and good quality will continue.

GREEN ONIONS

Ample supplies for the next few weeks with domestic and Mexican onions (providing more options in packs and sizes). Market has been higher this past week with supplies reducing to summer volumes.

HONEYDEW

Market is very strong with demand exceeds supply on all sizes as Mexico has little no volume and the Arizona and California desert volumes are light. The overall quality of the fruit is excellent with good sugars and great green to cream color. We will start some fruit on the Westside



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towards the end of this week which by the middle to end of next week we should be in better shape overall. Quality is very good: melons are sweet. Sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Light supplies continue in Salinas this week. Quality is overall good. Some puffy heads and mechanical damage is common. 30s are limited in supply. Weights are 38-44 lbs. Some shippers have better supplies than others. Prices and supply are expected to be steady.

JALAPEÑOS

East: Good supplies, good quality out of GA. FOB prices lower.

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.

KIWI

Tight availability. Chile is now the primary source; shipments are down this season.

LEMONS

Market is crazy as demand exceeds supply on all sizes and grades. We are currently harvesting only in dist. 2 (Coastal), whose fruit is a little mature on some ranches which you will see some school bus yellow and some heavier than normal wind scar. The overall quality is fair as we are into summer lemons and things will be a little rough until we get some Chilean arrivals towards the end of this month and hopefully we will start dist. 3 (desert) around the end of August if not sooner. Expect prices to continue to climb going forward and depending on when we can start dist. 3 or Mexico is when we will finally get some relief. Flavor is tart: sugar levels range from 6 to 8 Brix.

LETTUCE (GREEN & RED LEAF)

Normal supplies this week. Green and red leaf will be 23-34 lbs. per case with 9- 10" in length.

LIMES

Limes continue to drop in prices. 200s are as low as \$6.00 FOB.

NAPA

Light supplies.

ONIONS

Market is steady on Jumbo Yellows. Dips are not expected. Freight is still an issue as trucks remain tight in California and New Mexico.

ORANGES

Market steady with good demand and good with 113's and smaller a little tight all other sizes fair to good availability. The overall quality of the fruit is very good with excellent juice content and fairly firm fruit. We are all trying to get fruit off the tree to relieve it of some stress as we are all in a tough situation with the water. The trees are in bud drop now and water is very important to help us set a crop for next year. We will see what happens as we are all taking it day by day. Expect prices to strengthen as we get into mid-August through October until we start the California navels. Sugar levels range from 11 to 12 Brix.

PARSLEY (CURLY)

Plentiful supplies this week. Quality continues to be very nice. Bunches are measuring 8-10" in length with good green color.

PARSLEY (ITALIAN)

Plentiful supplies this week. Overall quality and appearance continues to be nice with 9-12" in length with dark green color. Prices are variable but those with good supplies are at the lower end.

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)

Currently, market is weaker. FOB's are lower on most sizes as supplies exceed demand for the time being. U.S. #2s are somewhat tight but have dropped slightly with the rest of the storage deal. Shelf life is limited as the potatoes that are nearly 9 months old.

RASPBERRIES

Producing regions: Baja, Oxnard, Watsonville, Santa Maria. Quality is good overall. Overcast conditions in CA have slowed growth of raspberries. Weather will remain cold and should warm up over the weekend and into next week. This week, limited in availability on CV and OG due to weather, expect supplies to remain tight through this weekend. Later next week, production should stabilize and availability should be strong on CV and OG raspberries through the month of June. Quality is very good, although bleeding is a minor issue. Sugar levels are high, ranging from 13 to 14 Brix.

RED CABBAGE

Strong supplies continue with improved yields produc-



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ing large, full heads. The trend is expected through next week while market pricing remains moderate.

ROMAINE HEARTS

Very good supplies this week. Demand is good. Color is light green with light cupping and uniform sizing. Heads are measuring 11- 12" in length and there is an occasional insect; otherwise quality is excellent.

ROMAINE LETTUCE

Supplies are very light this week. Demand continues to be good. Quality is very nice with 37-38 lbs per case and 11-12" in length. There are some insects present in some lots due to weather and will virtually be unavoidable for the next few weeks.

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. Peas from Mexico are also available.

SPINACH (BABY)

Good supplies.

SPINACH (BUNCHED)

Average supplies this week with slow demand resulting in a weak market. Overall quality features large and full, solid green bunches, measuring 9-11" in length with some light wilt present in bunches, carton weights range 20- 22 lbs.

SPRING MIX

Good supplies. The market is level. The quality of most varieties is very good, but large size and brittle texture are issues in spinach supplies. Maintaining the cold chain is critical to shelf-life.

SQUASH (YELLOW & ZUCCHINI)

Continued good availability and reasonable prices in California. East: Prices remain relatively stable as good supplies continue. Harvesting out of SC, GA and NC. Quality is improving.

STRAWBERRIES

Producing regions: Santa Maria, Watsonville, Salinas, Baja (OG only). South: Cool days, warm nights in Santa Maria have been giving a narrow range between day time highs and lows which can negatively affect quality, soft fruit can be expected. North: Moist mornings and cool days are minimally affecting strawberries, bruising can be expected. Watsonville and Salinas are primary loading areas. Although tight this week, peak volumes are not expected to become available for the next three weeks.

Quality is very good, although size is small due to low temperatures. Sugar levels range from 14 to 15 Brix.

TOMATOES

Round, Roma, Plum, Cherry, and Grape:

Prices are firm in all growing regions for round, grape and cherry tomatoes. Romas continue to offer the best value, although the market has strengthened this week. In the West, Baja California is the primary district, with the harvest getting underway in Central and Northern California; light availability in McAllen, Texas (from Eastern Mexico). The harvest transition northward is under way in the East, to North Florida and South Carolina. Rounds: FOB prices of all sizes remain steady. Quincy and South GA continue to harvest. Afternoon storms have hampered efforts in both regions. As previously reported, volume out of both regions are below average due to earlier rains and cool temperatures. As we look into the future, we still predict downward pressure on FOB prices as more supplies become available in both the east and west. Quality out of the SC fields is very good. Roma market is generally stable. Quality is good. The grape supply is still tight with steady FOB prices. Our SC crop is later than normal but is finally starting to ramp up. Current quality remains good. We look for FOB prices to fall due to more supplies in the coming weeks. Supplies are down to a point where there is not enough of a market for the USDA to quote prices. Demand is low and FOB prices are down. Quality remains good.

TREE FRUIT

(PEACHES, NECTARINES, PLUMS, CHERRIES)

Good supplies for California peaches and nectarines, the harvest is in full swing in Georgia and South Carolina. The size profile for red plums favors the smaller sizes that are preferred by foodservice; good supplies on black plums. Quality is very good: fruit is sweet and juicy. Sugar levels range from 12 to 13 Brix. California cherries have finished; limited availability on end-of season apricots. The Washington cherry harvest is in full swing. Demand is very good, supplies plentiful. Quality reported as excellent. Pricing is unstable.

WATERMELON

Good availability, with numerous growing areas now in production (CA, AZ, TX, GA, SC). Nogales will have through the month of June. Demand will increase as we approach the July 4th holiday selling period. Quality is average: fruit is firm and sweet. Sugar levels range from 12 to 14 Brix.