

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending July 18, 2014

## MARKET OVERVIEW

Demand continues to exceed supply for iceberg lettuce. Growers have been 10-14 days ahead of harvest schedules for a number of months caused by wide variations in temperature during spring. Growing conditions have normalized during June and harvest cycles have slowed due to seasonally cooler temperatures found in coastal growing areas, creating a continuing tight supply situation for various grower-shippers. Demand and quality remain good on most citrus items. Pricing on larger size lemons are nearing historical highs with no relief in sight. Both green and red cabbage are excellent at this time with favorable pricing. The sweet potato & yam markets are experiencing an industry-wide shortage in several regions of the country due to the abundance of rain during their 2013-2014 crop planting season. Shippers were unable to set approximately 1/3 of their normal crop, creating roughly a 50% shortage on inventories. Normal inventory is expected in approximately 35-40 days if the growing season is normal. Several shippers are declaring an Act of God situation and voiding contracts for the immediate future.

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	Moderate	Good	↔
Blueberries	Low	Good	↔↓
Blackberries	Moderate	Good	↔↑
Strawberries	Low to Moderate	Good	↑
Raspberries	Moderate	Good	↑
Grapefruit	Moderate	Good	↔
Lemons	High	Good	↑
Oranges, Navels, Valencias	High	Good	↔
Limes	Moderate	Good	↓
Pineapples	Moderate	Good	↔
Green, Red Leaf Lettuces	Low	Good	↔
Iceberg Lettuce	High	Good	↓
Romaine Lettuce	High	Good	↔
Romaine Hearts	High	Excellent	↔
Cucumbers	High	Good	↔
Green Beans	Moderate	Good	↓
Green Bell Peppers	High	Good	↑
Red Bell Peppers	Extreme	Poor	↔
Yellow Squash	Moderate	Good	↔
Zucchini	Low	Good	↔
Green & Red Seedless Grapes	Moderate	Good	↔
Peaches, Nectarines	Moderate to High	Good	↔
Cantaloupes	Low	Good	↓
Honeydews	Moderate	Good	↓
Artichokes	Moderate to High	Good	↓
Asparagus, Fennel/Anise	Extreme	Good	↔
Arugula, Bok Choy, Broccoli, Carrots, Frisee, Green Onions, Napa, Baby Spinach, Spring Mix	Moderate	Good	↔
Cauliflower	High	Fair	↔
Celery	Low to Moderate	Excellent	↑
Spinach (Bunched)	Low	Excellent	↔
Parsley (Curly & Italian)	Moderate	Very Good	↔
Snow & Sugar Snap Peas	Moderate to High	Good	↔
Green Cabbage	Low	Good	↔
Green Onions, Red Cabbage	Moderate	Excellent	↔
Cilantro, Peeled Garlic, Mache	High	Good	↔
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 Tomatoes	Low to Moderate	Good	↔
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 slow with retail utilizing shelf space for cherries, melons, stone fruit and grapes. Lower grades, 113s and smaller still in tight supply. Export demand has slowed but still active. Prices vary depending on what shipper has to offer at time of purchase. 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 (sugar to acid ratio). Washington pears are pretty much finished with only a couple large sheds left. Sugar levels range from 12 to 14 Brix. Hood River about finished for the sea-son. Imports are available, high prices, quality reported as good.

## ARTICHOKES

Heavy supplies available this week especially on larger sizes (12s and 18s). Quality is excellent with compact heads and consistent color. Prices are lower.

## ARUGULA

Good availability.

## ASPARAGUS

Mexico is the primary growing region. Cool, wet weather conditions have held back production, causing tight availability and high prices. The current shortage is expected to continue through late July.

## AVOCADOS

The avocado market has stabilized on 48s which continue to be of better value than 60s. 60s continue to increase in price. Peru is a good substitute on the smaller size avocados and available through September. Quality is best in California and Mexico where oil content is high and texture is creamy.

## BELL PEPPERS

**East:** The FOB market is slightly stronger this week as the rains from the hurricane have brought a sooner than normal end to the eastern NC region. The western NC crop continues. The East has had to also look west again this week to meet all of its demand. Suntan product is more available as the storm turned back the plant foliage exposing the pepper. Red bells remain extremely tight in all growing regions and FOB prices remain extremely strong. We see the red choice market remaining tight for at least two more weeks.

**West:** Various growers are harvesting but the excessive heat has caused supplies to be a little lighter than was expected. Fresno should start up mid to late July.

## BLACKBERRIES

Producing regions: Santa Maria, Watsonville, Salinas, Georgia, North Carolina, Baja, Oxnard. Quality is good overall. Wet, misty weather challenges, overcast conditions remain in Northern CA. Availability: GA, NC no additional availability through Monday/Tuesday, about one more week before the Southeast season ends. CA production will hold at low levels week to week. OG production limited in availability. Texture is firm, flavor is sweet, and sugar levels are average (ranging from 12 to 13 Brix).

## BLUEBERRIES

Producing regions: California, Baja, Oregon, Washington, New Jersey. Quality is good overall. Severe thunderstorms/heavy rain forecasted in NJ. At this time, no production challenges are anticipated. NJ has limited availability through the weekend. There are three more weeks left of production until the end of season. NC is finished for the season. PNW is currently in the peak weeks of production and transferring product into CA. Strong availability on OG on the West Coast. Berries are slightly floral and sweet. Sugar levels measure 14 to 18 Brix.

## BOK CHOY

Good supplies and favorable prices.

## BROCCOLI

Average supplies in Salinas this week, steady market and good quality (uniform shape and small to medium bead); though industry supply from the west coast will be reduced slightly for the next few months.

## CANTALOUPE

Market is steady with good supplies of 9's and larger and tight supplies of 12's and smaller as the crown picks off the Westside are on the larger side. We will start to see some smaller fruit in the next 7-10 days, the overall quality of the fruit is very good with excellent sugar and great interior color. We will have good supplies off the Westside and will be harvesting through mid-October. This is a great time to promote melons. Quality is excellent: sugar levels range from 11 to 12 Brix.

## CARROTS

Steady availability in California, lighter supplies available for shipment from South Texas (Mexico).

## CAULIFLOWER

Average supplies in Salinas for the next few weeks, although shipments continue to be below normal indus-





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try volume for this time of year. Lack of supplies has put pressure on pricing. Quality remains fair, medium size curds and off white in color. Expecting improvement in supplies and pricing next week.

## CELERY

Average supplies this week with strong demand for smaller sizes. The market has strengthened this week. Oxnard is finished and only Santa Maria and Salinas are packing. Quality is excellent with dark green and meaty shanks. Weights are 58-61 lbs. per case.

## CILANTRO

Steady supplies this week. Quality and appearance continue to be nice with bunches averaging 9-11 inches in length with good green color. Market prices continue as high due mainly to the lack of product coming out of Oxnard.

## CUCUMBERS

**East:** Supplies remain short. MI has started to harvest but we are seeing some quality issues due to rains. Eastern NC is winding down. Quality is variable.

**West:** Baja crossings have increased but still cannot keep up with demand. The Northwest region has begun to harvest with light volume. Prices remain strong this week but volume should increase and fob prices should fall in the coming weeks.

## EGGPLANT

Harvesting in NC now. FOB prices are weak and quality is very good.

## FENNEL/ANISE

Fennel supplies are projected to be slightly above demand this week. Sizing is decent. Expect the market to remain active this week due to continued decent demand and light supplies industry wide.

## FRISEE

Adequate supplies.

## GARLIC

Processors will begin using new crop California garlic in early July. Note that this early sea-son garlic will show some green color, as the bulbs are large and have had exposure to direct sunlight during the growth cycle. Note that prices for Chinese garlic will increase substantially in July, as higher duties have been assigned by the U.S. Department of Commerce to the majority of importers. Demand will increase, along with prices, for California garlic, as imports are expected to decline.

## GRAPEFRUIT

Rios are finished. Good supplies of Stars for larger sizes. Small sizes are in short supply.

## GRAPES

Market is steady as we are full steam ahead out of the central valley and will be in good volume through November on all colors. The overall quality looks good, but the early reds now are a little rangy in size but have very good sugar. The reds will continue to size and we will see better size as we get towards the end of the month. The greens are in good supply with a few left down in Nogales which will clean up by the weekend. We do expect good volume through the season and we are all crossing our fingers that our wells hold up as we have enough water to get ourselves through the season especially towards the later part of season. Sugar levels range from 17 to 18 Brix.

## GREEN CABBAGE

Green cabbage supplies remain steady with excellent quality and moderate pricing. Heads are round and medium in size with good green color (22-24 ct.). No signs of changes in the weeks ahead.

## GREEN ONIONS

Volume is on the lighter side as Mexican supply nears completion and return in September. During this time, only domestic supply is available. Quality and pricing expect to remain steady.

## HONEYDEW

Market is very strong with demand exceeds supply on 6's and smaller and we will be in a tight situation for the next 7-10 days until a few more fields start to break. The overall quality is excellent with great sugar and good interior color and a nice green to cream exterior color. Expect good supplies of honeydews through mid-October off the Westside. Quality is very good: melons are sweet. Sugar levels range from 11 to 13 Brix.

## ICEBERG LETTUCE

Volume continues to remain below average. Demand is strong. Some shippers have better supplies than others. Quality is good with medium firm heads, 38-42 lbs. and good green color.

## JALAPEÑOS

**East:** Good supplies and good quality continue in the east. FOB prices generally steady.

**West:** Supplies out of Baja continue strong with steady



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prices. The CA crop is just starting to be harvested. Field reports indicate that the CA crop looks very good in both quality and volume.

## **KALE (GREEN)**

Plentiful supplies this week. Overall quality and appearance is very nice with bunches and lengths measuring 9-11" and dark green color.

## **LEMONS**

Demand exceeds supply on all sizes and grades, and we are in for some rough months ahead as we have lighter volumes out of dist. 2 and very light supplies arriving from Chile. We do not expect huge volume from Chile due to the global shortage of lemons. The Chilean growers will be sending more fruit to the Pacific Rim than normal and less volume to the States. There should be some fruit crossing from Mexico in the next 2-3 weeks which will help some but unfortunately we are going to be struggling to cover orders and will need to really stay in touch and possibly use touching sizes and grades until we get started out of the desert around the first of September. Sugar levels range from 6 to 8 Brix.

## **LETTUCE (GREEN & RED LEAF)**

Supplies are normal on green and somewhat lower on red leaf this week. Quality is very good with the pack on green and red leaf expected to be 22-24 lbs. per case and 9-10" long per head.

## **LIMES**

The market is unchanged; all sizes are available. Quality has improved: fruit is firm and juicy with tart flavor.

## **NAPA**

Light supplies and high prices.

## **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 supplies of 88's and larger and a little light on the smaller fruit as demand is excellent, the overall quality of the fruit is good with excellent juice and sugar content. We are starting to see some re-greening due to the excessive heat we have been having but for the most part color is good. We expect to have good supplies of fruit through the middle of August and then see things trend upward. Quality is very good: fruit is sweet and juicy. Sugar levels range from 11 to 13 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)**

Slight decrease in supplies this week. Overall quality and appearance continues to be very nice with 9-11" in length with dark green color.

## **PINEAPPLES**

Overall volume remains lower than normal, but the market will stay steady for the next several weeks; demand is low. 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. US #2s are some-what 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/weather: Some reports of soft fruit. Harvests are coming in consistently lighter than estimates. Wet, misty weather challenges, overcast conditions remain in Northern CA. Availability: CV, availability continues to decline as estimates are declining as forecasted. August will bring more volume OGs are decreasing week to week and are light in availability. Quality is good; berries are plump and firm. Sugar levels are high, ranging from 13 to 14 Brix.

## **RED CABBAGE**

Some regional production on red cabbage is lighter this week, resulting in better demand and steady pricing.

## **ROMAINE HEARTS**

Supplies are extremely light to average depending on shipper; however, no gaps are anticipated over the next few weeks. The lighter supplies in Salinas are a result of being 10-14 days ahead of harvesting schedule since beginning of the season. Hearts that are being harvested in Salinas are greener and more leafy than normal. Situation should improve over the next few weeks. This week due to the lighter supplies, only a limited supply is available on a daily basis. Demand is very good. Appearance and quality are very good; light green with good cupping and uniform sizing.





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## SNOW AND SUGAR SNAP PEAS

Good supplies (California, Mexico, Guatemala).

## SPINACH (BABY)

Good supplies.

## SPINACH (BUNCHED)

Steady supplies again this week. Overall quality is excellent and demand is slow though per acre yields are very strong. Bunches are large, dark green in color and lengths are 10-11". Weights are between 20-21 lbs.

## SPRING MIX

Prices are unchanged. Quality is very good for most varieties, but large size and brittle texture are occasional issues in spinach. Maintaining the cold chain is critical to shelf-life, especially in the summer.

## SQUASH (YELLOW)

**East:** Continue harvesting out of SC and NC. FOB prices are generally steady. Quality is good.

**West:** Good supplies continue with generally steady prices.

## SQUASH (ZUCCHINI)

**East:** Good supplies available from SC and NC. Market is generally steady. Quality is very good.

**West:** Good supplies available from Fresno and Baja. Quality is very good.

## STRAWBERRIES

Producing regions: Santa Maria, Watsonville, Salinas, Baja (OG only). Quality is good overall. Production has implemented action plans to reduce the quality issues and will adjust size specs for packing (smaller fruit currently being seen). Wet, misty weather challenges,

over-cast conditions remain in Northern CA. Availability: CV, Strong projected to gradually decline week to week. OGs are forecasted to decrease over the next few weeks with Watsonville/Salinas as sole production areas. Quality is very good: flavor is sweet and color is deep red. Sugar levels range from 14 to 15 Brix.

## TOMATOES

### EAST

**Rounds:** Ample supplies continue from several growing regions. Quincy has finished and eastern SC will finish up later this week. The mountains of NC and Western SC are coming on with more volume. Our VA crop is still about one week away. CA continues with strong volume. FOB prices have fallen another on all sizes. Quality is very good. Though prices are down again this week, we predict there will be slightly upward pressure in the next week or two, especially on the larger sizes, as the weather in both the east (hurricane) and west (extreme heat) will affect crops in the short run. Fortunately, hurricane Arthur did not cause any major damage to the crops last week.

**Romas:** Quincy and south GA are cleaning up fields and quality is variable. Crops in Western NC and the Eastern Shore of VA are just beginning. The hurricane has delayed the coastal crop by a few days. The market is generally steady.

**Grapes:** Hurricane Arthur has brought an early end to our SC coastal crop. Supplies continue strong enough to keep FOB prices stable. Quality remains very good.

**Cherries:** FOB prices are stable at a very low level. Quality remains very good. Our next large growing region in the East will be the Eastern Shore.

### WEST/MEXICO

**Rounds:** Supplies remain strong and FOB prices have fallen another \$1 from last week. Quality of these mature greens is also good. High temperatures in the growing regions have been over 100 for the past 8 days. We think we will make it through July okay, but we predict that these extreme temperatures will have an effect on quality and volume in August. Mexican crossings of vine ripers continue at Otay Mesa and McAllen. Crossings continue light again this week and prices remain high. This light volume is the result of extremely high temperatures that the growing regions experienced in May. Quality of these vine ripers continues to be variable.

**Romas:** Crossings continue at McAllen and Baja. CA growers continue this week. Quality remains very good.



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Prices are generally up between \$1 to \$3 depending on size and region.

**Grapes:** Grapes continue to cross at Baja with slightly higher FOB prices. Supplies should increase next week. CA growers have started harvesting. Crossings at McAllen are also increasing. We see no gaps in grape supplies in the foreseeable future. Quality is good to very good.

## **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. Quality is very good: fruit is sweet and juicy. Sugar levels range from 12 to 13 Brix. The apricot season is finished. Washington cherry demand is very good, supplies tight on smaller sizes, strong retail ad support. Quality reported as excellent. Pricing has leveled.

## **WATERMELON**

July is National Watermelon month. Plentiful supplies in multiple districts throughout the U.S. Quality is outstanding. Fruit is deep red, firm, and sweet. Sugar levels range from 12 to 14 Brix.