

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending August 8, 2014

MARKET OVERVIEW

Prices remain firm for carton-packed romaine and romaine hearts. Demand and quality remain good on most citrus items. Pricing on larger size lemons are nearing historical highs with no relief in sight. Many mixed vegetable items are excellent in quality and are favorably priced. The sweet potato and 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 several weeks 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	Moderate	Good	↑
Blackberries	Moderate	Good	↑
Strawberries	Low to Moderate	Good	↑
Raspberries	Moderate	Good	↔
Grapefruit	Moderate	Good	↑
Lemons	Extreme	Good	↑
Oranges, Navels, Valencias	High	Good	↔
Limes	Moderate	Good	↓
Pineapples	Moderate	Good	↔
Green, Red Leaf Lettuces	Low to Moderate	Good	↔
Iceberg Lettuce	Moderate	Fair	↔
Romaine Lettuce	Moderate	Good	↔
Romaine Hearts	High	Fair	↔
Cucumbers	Moderate	Good	↓
Green Beans	Moderate	Good	↓
Green Bell Peppers	High	Good	↓
Red Bell Peppers	High	Good	↔
Yellow Squash	Moderate	Good	↔
Zucchini	Low	Good	↔
Red Seedless Grapes	Low	Excellent	↔
Green Seedless Grapes	Moderate	Excellent	↔
Peaches, Nectarines	Moderate to High	Good	↔
Cantaloupes	Low	Good	↔
Honeydews	Moderate	Good	↔
Artichokes, Celery, Parsley (Curly & Italian), Red Cabbage	Moderate	Excellent	↔
Asparagus	High	Good	↓
Arugula, Bok Choy, Carrots, Frisee, Napa, Baby Spinach, Spring Mix	Moderate	Good	↔
Cauliflower	Low	Good	↓
Spinach (Bunched)	Low to Moderate	Excellent	↔
Broccoli	High	Fair	↔
Snow & Sugar Snap Peas	Moderate to High	Fair	↑
Green Onions	Low to Moderate	Good	↔
Cilantro	Moderate	Very Good	↔
Fennel/Anise	Extreme	Good	↔
Peeled Garlic, Mache	High	Good	↔
Green Cabbage, Kale (Green)	Low	Excellent	↔
Red, White, & Yellow Onions	Moderate	Good	↔
Potatoes	Low	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 steady, retail gearing up for back to school. Lower grades, 113s and smaller still in tight supply, good movement on 88 larger red delicious. Export demand has slowed but still active. Storages are running low and some shippers are winding down on a few of their varieties. Prices relatively stable, few prices lower on goldens and Fuji's. New crop Ginger gold's to start next week followed by galas next two weeks. Sugar levels measure 12 to 14 Brix (sugar to acid ratio). The California Bartlett, Bosc, and Red Crimson markets are stable. The Washington D'Anjou season is ending; prices are elevated and stocks are limited. Washington new crop Bartlett harvesting will begin in mid-August. Sugar levels range from 12 to 14 Brix.

ARTICHOKES

Strong supplies available this week especially on larger sizes. Quality is excellent with good consistent color and tight compact head shape. Recent hot temps have had no impact on the appearance or condition.

ARUGULA

Good availability.

ASPARAGUS

Mexico is the primary growing region. Prices have reversed from recent extreme highs, with more volume crossing the border from Mexico. Peru shipments are increasing slightly and the pricing has drifted lower for next week.

AVOCADOS

California avocados should be finished for the most part by the end of August. New supplies will not be in volume until late January. New crop Mexican has started with a crop believed be 11% above last year. Prices should be fairly stable to somewhat lower until mid-August when they will begin to start upward again with no competition from Peru/US. Quality is very good in California and Mexico: oil content is high and texture is creamy.

BELL PEPPERS

Availability has improved slightly for green bell peppers in California, although the harvest in Eastern North Carolina is winding down, and new crop districts in New Jersey and Michigan will not have significant volume until mid-August. Prices remain above seasonal averages in the East and, to a lesser degree, in the West. Next week we expect to see additional weakness in the market for California green bells. Red bells are in plentiful supply in Southern California, with hothouse grown colored bells from Mexico also available.

BLACKBERRIES

Favorable growing conditions producing good quality in California. Conventional availability in all areas. Organic production is limited. Additional producing regions include Oregon, North Carolina and Washington. Texture is firm, flavor is sweet, and sugar levels are average (ranging from 12 to 13 Brix).

BLUEBERRIES

Good quality overall. Both conventional and organic blue production has decreased from last week. Unpredictable weather (heat and rain) may impact future availability and quality in California, Baja, Oregon, Washington and BC. Berries are firm, juicy, and sweet. Sugar levels measure 14 to 18 Brix.

BOK CHOY

Good supplies and favorable prices.

BROCCOLI

Slightly below average supplies this week. Quality is fairly nice with larger sizing available. The weather has brought on occasional brown bead, but crews are taking extra steps to make sure none of these quality issues make it into the box. Expect the market to be a bit more active this week as there are lighter supplies with some shippers in Salinas and Santa Maria projected for this week and potentially next week.

CANTALOUPE

Market is steady with good supplies off the Westside and we are in full swing with good availability on all sizes. The overall quality is excellent with a nice clean net, full slip, and excellent sugar and internal color. We expect to continue with good volume going forward and anticipate quality to continue to be excellent barring any problem with mother nature. Quality is very good; sugar levels range from 11 to 12 Brix.

CARROTS

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

CAULIFLOWER

Slightly above average supplies this week with decrease in demand. Quality remains very strong overall with medium plus size white curds and tight packs weighing 28-33 lbs.

CELERY

Demand is fair and the market is steady. Local growing regions are getting heavier production (Michigan). Overall quality is good and weights are strong (59-61 lbs.). Color is dark green with very meaty shanks. Light dirt is present in the bottom of some heads.



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CILANTRO

Very good supplies this week. Quality and appearance continue to be very nice with bunches averaging 9-11 inches in length with good green color.

CUCUMBERS

East: More supplies coming online as the weather warms in MI. Quality is variable due to recent rains. As more supplies become available the market has become weaker.

West: Baja crossings continue. The Northwest region continues. More supplies are putting downward pressure on FOB prices.

EGGPLANT

Harvesting in NC now. FOB prices are stronger due to cooler weather. Quality is very good.

FENNEL/ANISE

Fennel supplies this week are projected to be close to demand for the week. Expect the market to remain active this week due to continued decent demand and lighter supplies still projected industry wide.

GARLIC

Processors began using new crop California garlic in early July. Note that this early season garlic will show some green color, as the bulbs are large and have had exposure to direct sunlight during the growth cycle. Demand will increase, along with prices, for California garlic, as imports are expected to decline.

GRAPES

We are in full swing in the Central Valley on all colors with some very nice quality on all varieties. The overall size on the flames is down a bit from last year due to a water situation as well as the warmer than normal winter and the lack of chill hours. We expect good supplies and quality through the year as we progress through all our varieties until November and possibly into December, depending on the weather. Green seedless sugar levels range from 17 to 18 Brix; red seedless sugar levels are slightly higher at 18 to 19 Brix.

GREEN BEANS

Good availability in the East and West.

GREEN CABBAGE

Steady supplies for the next week with 50-55 lbs. cartons. Texture and flavor our both excellent on western cabbage. There's been continued disruption of many regional production areas due to abnormal, cool weather patterns throughout the upper Midwest and eastern part of the country.

GREEN ONIONS

Expect lighter supplies of green onions for the next few weeks. Yields are very low on domestic onions; projecting a gap next week. The market is steady.

HONEYDEW

Market is still strong but has eased a bit as production continues to increase on the Westside on all sizes. The overall quality is excellent with a nice green to cream exterior and excellent sugar an internal color. We anticipate things to stay steady and will have fruit through mid-October before we transition to the desert and Mexico. Sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Light supplies continue this week. Demand is fairly good. Quality is fairly good with more than average amount of 30s. Head size is medium to small, pale in color due to cap leaves being removed from mildew and occasional thrip damage. Weights are 40-43 lbs.

JALAPEÑOS

East: Good supplies and good quality continue in the east with most supplies coming from NC and NJ. MI is starting. FOB prices generally steady.

West: Supplies out of Baja continue. Fresno has finished and San Maria has started. Quality is very good.

KALE (GREEN)

Plentiful supplies this week. Overall quality and appearance is exceptional with bunches and lengths measuring 14-16" and dark green color.

KIWI

Tight availability on Chilean kiwi, which will continue through the season.

LEMONS

DEMAND EXCEEDS SUPPLY. We are in a very tough situation—one that is similar to last year's situation from August through October. We do not feel this situation will last 3 months but it will be very tough through August and September as we will not start our dist. 3 (desert) until probably late September or first of October. We will do all we can to cover orders but may run into offering standards for choice as the overall quality is fair to good, with some lots not as strong as others and some clear rot showing up as well as some higher maturity fruit. The Mexico production is starting in a very light way and will continue to increase and hopefully the quality will also get better as some of the first fruit was very rough. There is also a few Chilean first arrivals and fruit looks very good



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but the overall Chilean volume will be down to USA due to this global shortage of lemons, and all other countries are clamoring for them as well.

LETTUCE (GREEN & RED LEAF)

Supplies and quality will be above normal on all mix leaf. Green and red leaf will be 22-23 lbs. per case and 9-10" long.

LIMES (PERSIAN)

Prices have stabilized; new crop supplies are sufficient. Expect the market to continue inching down through August. Quality is good: light color, brown spots, scarring, and stem decay are improving.

NAPA

Light supplies and high prices.

ONIONS

Prices have advanced once again this week, as New Mexico experienced a significant amount of rain recently. Delays in harvest have put pressure on the California shippers where supplies were tight to begin with. Walla Walla yellow onions are now available, along with limited availability on Vidalia onions.

ORANGES

Market steady to strong especially on 88's and smaller, the overall quality is very good with excellent juice and sugar content. The exterior will show some light green due to our excessive heat; the fruit starts to re-green due to the fact that the tree is holding on to next year's crop as well as this year's, so the tree takes care of itself as far as nutrients and deprives the fruit, which in turn it starts to re-green which is normal for summer Valencia's. We will be going on Valencia's through October and will start to see the market strengthen around the middle of August as our production numbers start to lighten up. Quality is very good: fruit is sweet and juicy. Sugar levels range from 11 to 13 Brix.

PARSLEY (CURLY)

Plentiful supplies this week. Quality is outstanding. Bunches are measuring 8-10" in length with good green color.

PARSLEY (ITALIAN)

Plentiful supplies industry wide this week. Quality is very nice and bunches are averaging 9-11" in length with a rich, dark green color.

PINEAPPLES

Prices are steady, although stocks are tighter than normal. Volume is forecast to increase next month. Quality

is very good: flavor is tangy and sweet, while texture is firm and juicy. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Prices continue to trend lower. FOB's are lower on most sizes as supplies exceed demand for the time being. US #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 nine months old. New crop Norkotah harvest will begin next week with some Idaho growers.

RASPBERRIES

Quality is improving with favorable daytime temps and availability is strong for both conventional and organic raspberries in Baja, Oxnard, Watsonville, Santa Maria and Salinas. This trend is expected to continue into August. Berries are sweet; sugar levels remain high, ranging from 13 to 14 Brix.

RED CABBAGE

Supplies are very light for this time of year; regional production areas supplying local needs. With abnormal summer temps throughout the country, demand is stronger. Head size has been average with slightly higher weights; the result of very dense product from ideal growing conditions in Salinas.

ROMAINE HEARTS

Market prices of romaine and romaine hearts have been on the rise for the past month. This increase may be due in part to some issues with "home-grown" produce and the effects from storms, heat and drought in the Midwest and East, thus increasing demand for California veggies. The drought has also affected California's Central Coast area. Crop production has been off-projection in numerous fields. Some growers are harvesting early resulting in underdevelopment; green and lighter in weight and future production can be affected. Prices are expected to be higher for at least another week. Overall supplies will continue to be average. Demand remains strong. Quality is fairly good due to an increased amount of fringe burn is appearing in the fields; normal for this time of year. Product is being harvested at a younger age before it develops this issue. Care is also being taken at harvest to minimize any burn that is present.

ROMAINE LETTUCE

Short supplies this week in the west; fringe burn issues and increased supplies coming out of the eastern U.S. and Canada. Quality in the box will be clean with each head being 11-13" long. Carton weights will weight 35-37 lbs. Expect to see some irregular heads along with an occasional 1-3" seeder.



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SNOW AND SUGAR SNAP PEAS

Reduced yield from selected California shippers has caused availability to tighten. Offshore production is increasing and pricing has dropped this week.

SPINACH (BABY)

Good supplies.

SPINACH (BUNCHED)

Average supplies this week. Due to heat and humidity mildew has been seen in the fields; however, overall quality is good. Weights are 22-24 lbs. and bunches are large and full with 10-11" in length and dark green color.

SPRING MIX

Plentiful supplies. The market is level, yet yields are decreasing. High temperatures are causing mildew and heat-related defects; aphid counts are rising also. Maintaining the cold chain is critical to shelf-life, especially in the summer.

SQUASH (YELLOW)

East: Continue harvesting out of SC and NC with light volume. NJ and MI are not the major suppliers. Cool weather and rains continue to affected quality and quantities causing the market to be stronger.

West: Good supplies continue crossing at Baja but with variable quality but stronger demand is causing higher FOB's.

SQUASH (ZUCCHINI)

East: Limited supplies available from SC and NC. NJ and MI are major providers. Quality is good and demand is up but FOB's not has high as for yellow.

West: Supplies available from Baja. Fresno is winding down and quality is only fair. Santa Maria region has begun with much better quality. Quality dictates FOB pricing.

STRAWBERRIES

Strong availability in Watsonville, Salinas and Santa Maria for both conventional and organic. Berry size is medium, with limited availability of the larger sized berries that are required to be packed as stem berries. Quality is expected to improve with cooler nights in Northern CA combined with mid-high daytime temps. Production is expected to cycle downward in August. Flavor is sweet; sugar levels range from 14 to 15 Brix.

TOMATOES

EAST

Rounds: Ample supplies continue from several growing

regions. Western NC and SC, TN, Eastern Shore of VA, NJ, and AL (vine ripen) are all producing. FOB prices for 5x6s are down slightly from last week and unchanged for the 6x6s and 6x7s. Quality is very good. We see good volume into August unless the rains interrupt.

Romas: Primary harvesting areas are Western NC and the Eastern Shore of VA. Good supplies and weak demand have caused FOB prices to remain stable or down slightly. Quality remains very good.

Grapes: Supplies from VA, TN, NC, SC and AL continue strong enough to keep FOB prices stable. Quality remains very good.

Cherries: Demand continues to be weak as supplies continue to be tight. FOB prices are stable. Quality remains very good. The Eastern Shore of VA is the primary sourcing area.

WEST/MEXICO

Rounds: As predicted, supplies are a little lighter due to previous heat causing FOB prices to be up on all sizes. Mexican crossings of vine ripen continue at Otay Mesa and McAllen but are also lighter causing FOB prices of the vine ripen to be up around \$3 on all sizes.

Romas: Crossings continue at McAllen and Baja. CA growers continue this this week. Quality remains good but variable due to excessive heat. Prices are stable in CA and McAllen but are up for Baja crossings.

Grapes: Crossings from Baja continue strong with stable FOB prices. Crossings at McAllen also continue. We see no major 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, some shippers on their last packs. Quality reported as excellent. Pricing stable.

WATERMELON

Quality is excellent. Prices are unchanged; although supplies are becoming more plentiful in California, fewer acres were planted due to water shortages (preventing any real gains). Fruit is deep red, firm, and sweet. Sugar levels range from 12 to 14 Brix.