

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending August 15, 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. Limes are back on the increase due to rains in Mexican growing areas, and prices are fluctuating. 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 a third of their normal crop, creating roughly a 50% shortage on inventories. Normal inventory is expected in less than 30 days.

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	Moderate	Good	↔
Blueberries	Low	Good	↑
Blackberries	Moderate	Good	↑
Strawberries	Moderate	Good	↑
Raspberries	Moderate to Low	Good	↔
Grapefruit	Moderate	Good	↑
Lemons	Extreme	Good	↑
Oranges, Navels, Valencia's	High	Good	↔
Limes	Moderate	Good	↓
Pineapples	Moderate	Good	↔
Green & Red Leaf Lettuces	Low	Very Good	↔
Iceberg Lettuce	Moderate	Good	↑
Romaine Lettuce	Moderate	Fair to Good	↔
Romaine Hearts	High	Excellent	↓
Cucumbers	High	Good	↑
Green Beans	Moderate	Good	↔
Green Bell Peppers	Moderate	Good	↓
Red Bell Peppers	High	Good	↑
Yellow Squash	Moderate	Good	↔
Zucchini	Moderate	Good	↔
Green & Red Seedless Grapes	Moderate	Good	↔
Peaches, Nectarines	Moderate to High	Good	↔
Cantaloupes	Low	Good	↔
Honeydews	Low	Good	↔
Artichokes, Celery	Low to Moderate	Excellent	↔
Parsley (Italian), Red Cabbage	Moderate	Excellent	↔
Asparagus	High	Good	↔
Arugula, Bok Choy, Carrots, Frisee, Mache, Napa, Baby Spinach, Spring Mix	Moderate	Good	↔
Cauliflower	Low	Fair	↓
Spinach (Bunched)	Low	Excellent	↔
Broccoli	Low to Moderate	Good	↔
Snow & Sugar Snap Peas	Moderate to High	Good	↔
Green Onions	Moderate	Good	↑
Cilantro, Parsley (Curly)	Moderate	Very Good	↔
Fennel/Anise	Extreme	Good	↓
Peeled Garlic	Extreme	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	Low	Good	↔
Red & Golden Delicious, Bosc Pears	Moderate	Good	↑
Galas, Granny Smiths, Fujis	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. Sugar levels measure 12 to 14 Brix (sugar to acid ratio). Prices relatively stable, few prices lower on Golden and Fujis. New crop Ginger Golds have started, galas within next two weeks, Bartlett pears next week in North Carolina and Eastern Washington. Sugar levels range from 12 to 14 Brix.

ARTICHOKES

Very good supplies available this week on most key sizes (12-18). Quality is excellent with tight, compact heads and uniform coloring and sizing.

ARUGULA

Good availability.

ASPARAGUS

Better availability for standard and large sizes from Mexico, however jumbo asparagus prices remain at the extreme highs. Peruvian asparagus is available in Miami.

AVOCADOS

California volume is on the decline. Eating quality is prime; buttery, rich flavor and high oil content. Peak sizes on 48s and 60s. California season is expected to continue into mid-September, but the majority of the remaining volume will be harvested in August. Mexico has finished with old crop and now harvesting Flor Loca crop. Eating quality and the maturity of the fruit is good; should reach excellent as month progresses. Predominant sizes are 48s and 60s. New crop will start up in September. Quality is very good in California and Mexico: oil content is high and texture is creamy.

BELL PEPPERS

East: More supplies and weak demand are causing lower FOB prices. Western NC, NJ, and MI are the major supply regions.

West: More supplies and weak demand is also the story in the west. Fresno continues to harvest. Oxnard is starting up. Prices are trending lower for green bells, with California being supplemented by increasing regional production in northeastern districts. Supplies are dropping for red bells in California during the harvest transition from the San Joaquin Valley to coastal districts; prices are moving sharply higher.

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 and flavor is sweet. Sugar levels range 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

Supplies this week will be below average. Quality remains nice with larger sizing available. Like most growers the field is continuing to battle brown bead, hollow stem and decay. The crews are taking extra steps to make sure none of these quality issues make it into the box. There are lighter supplies industry wide in Salinas and Santa Maria due to quality issues at the field level affecting production and yields.

CANTALOUPE

Market all over the board depending on quality and inventories. The overall quality is excellent with a nice clean netting and excellent color and sugars. We will be going on fruit through mid-October and expect things to keep steady for the next few weeks and then try to strengthen a bit towards the middle to end of August. Sugar levels range from 11 to 12 Brix.

CARROTS

Slightly higher prices for jumbo carrots in California; steady availability from Mexico.

CAULIFLOWER

Supplies will be slightly below average this week. Sizing will be a majority of 9 and 12ct with a few 16s available each day. Current quality is fairly good; off-white curds, medium size and light green jacket leaves.

CELERY

Average supplies this week while demand is slow (Michigan and Canada becoming stronger in production numbers). Weights are between 60- 62 lbs., dark green color and very meaty shanks).



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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 in MI. Quality is variable due to recent rains. With more supply and weak demand, FOB prices are lower.

West: Baja crossings continue. The Northwest region continues. Supplies are a little lighter and the west may have to go to MI to meet all of its demand.

EGGPLANT

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

FENNEL/ANISE

Fennel supplies this week are in line with demand this week.

GARLIC

Very tight supply, less planted acreage for new crop garlic in the San Joaquin Valley.

GRAPES

Market is steady with good supplies of all colors and packs, the overall quality is excellent with very high sugars and nice firm berries. We will be going strong on grapes through November barring any weather issues. This is an excellent time to promote California grapes. Expect the market to keep steady through August and then start to strengthen as we move into some of our storage fruit. Green seedless sugar levels range from 17 to 18 Brix; red seedless sugar levels are slightly higher at 18 to 19 Brix.

GREEN BEANS

Plentiful supplies in the East, adequate in the West.

GREEN CABBAGE

Cooler temperatures have caused slower growth in many new fields. Supplies should be steady but not above average for this time of the year. Head size is average with 45 lb. minimum carton weights. Movement is slow as many regional production areas have reduced demand for west coast green cabbage.

GREEN ONIONS

Shippers have been cutting back on acres for the summer program. Prices are advancing. Volume is down with summer domestic program lighter than normal with few Mexican onions to supplement the next few weeks.

HONEYDEW

Market is steady but has eased a bit from last week as production numbers have started to increase. The overall quality is excellent with a nice green to cream finish and excellent internal color and sugar, expect quality to stay very good barring any major weather issues, we expect to be going through mid-October and then transition to the desert. Sugar levels range from 11 to 13 Brix.

ICEBERG LETTUCE

Light supplies continue this week though demand is fairly strong. Quality is good, with an average amount of 30's. Weights are 38-43 lbs. Quality is good other than Sclerotinia and mildew issues which are normal for this time of year.

JALAPEÑOS

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

West: Supplies out of Baja and San Maria continue. Quality is very good.

KALE (GREEN)

Plentiful supplies this week. Overall quality and appearance is outstanding 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 still exceeds supply and we will probably be in this position for the next 2 months, as we are light on Dist. 2 supplies. There are some Chilean and Mexican product showing up but not an overwhelming amount of fruit. We expect Mexico to gradually increase crossings and Chilean fruit to be fewer than previous years due to the global demand. The overall quality of the fruit is fair with some high maturity and bronze color showing up. We expect to start Dist. 3 (California Desert) around the end of September and will see supplies start to get back to normal by the middle part of October. Sugar levels range from 6 to 8 Brix.

LETTUCE (GREEN & RED LEAF)

Normal supplies of green leaf, but short supplies of red leaf this week. Overall quality remains very good on both green and red leaf with 20-22 lbs. per case and 9-10" per head.



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LIMES (PERSIAN)

Pricing has fluctuated according to weather in Mexico; up last week but down again this week. With more new crop limes, smaller sizes are more abundant. Quality is good: light color, brown spots, scarring, and stem decay are minor quality issues.

NAPA

Good availability and favorable prices from selected shippers.

ONIONS

Prices have begun to soften on yellow onions as Washington is shipping heavier volumes and are overlapping with California and New Mexico. Larger size onions remain at a premium as size profiles are more plentiful to medium yellows. The market is expected to experience some instability for the next few weeks as Idaho will begin to ship and a surplus of supply is possible.

ORANGES

Market is steady and very strong on 88's and smaller as some packers are slowing down packing to help prolong their season. The overall quality of the fruit is very good but you will see some fruit showing some green to light green color as the fruit is starting to re-green due to our hot weather, and the trees are stressing as well due to our water shortage. Expect the market to stay steady to strong through the end of the October until we start California navels. 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)

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

PINEAPPLES

Despite limited supplies, the market is level. 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 have firmed up as supply on old crop Burbanks continues to dwindle. Growers are now beginning to harvest new crop Norkotah potatoes. There is a two-tiered pricing system between old crop Burbanks and new crop Norkotahs, with new crop Norkotahs garnering higher FOB pricing at the moment.

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. Sugar levels remain high, ranging from 13 to 14 Brix.

RED CABBAGE

Steady production and yields this week. Slightly cooler weather however has affected head density (lighter with slightly lighter weights overall). Some regional growing areas have started slowly but will be affecting the demand on west coast cabbage supplies continually.

ROMAINE HEARTS

Supplies will average this week with steady demand though slightly lower than previous weeks. With the exception of an occasional misshapen head, quality is very good with light green color, good cupping and 12-13" in length.

ROMAINE LETTUCE

Supplies will be somewhat short this week. Demand is less this week with eastern Canada increasing production over the past few weeks. Quality should be stronger this week than last with 37-38 lbs. per case and 11-12" long heads. Some light but occasional tip burn is showing.

SNOW AND SUGAR SNAP PEAS

Good supplies (California, Mexico, Guatemala).

SPINACH (BABY)

Good supplies.

SPINACH (BUNCHED)

Steady supplies this week. Overall quality is excellent with weights of 22-24 lbs. Bunches are full and large with length between 10-11 inches and dark forest green color. Demand is fair.

SPRING MIX

Prices are level, but yields are decreasing due to high temperatures. Quality problems such as aphids, heat related defects, and mildew are tightening stocks. Maintaining the cold chain is critical to shelf-life, particularly during these summer months.

SQUASH (YELLOW)

East: Continue harvesting out of SC and NC with light volume. NJ and MI continue to be the major suppliers. Demand is weak. Quality is variable but good quality is available.



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West: Good supplies continue crossing at Baja but variable quality is causing good quality product to be in shorter supply. Santa Maria is beginning to harvest.

SQUASH (ZUCCHINI)

East: Limited supplies available from SC and NC. NJ and MI are major providers. Quality is good and demand is weaker compared to last week. Downward pressure on FOB prices.

West: Supplies available from Baja. Fresno continues to wind 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, MI, and AL (vine ripens) are all producing. FOB prices for 5x6s are steady from last week but the smaller sizes are a little tighter. The FOB prices are up for 6x6s and a little more for 6x7s. Quality is very good. We see good volume in the East into August unless the rains interrupt.

Romas: Primary harvesting areas continue to be Western NC and the Eastern Shore of VA. MI has also begun. 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: Supplies continue to be relatively tight. FOB prices are up \$2 from last week. Quality remains very good. The Eastern Shore of VA is the primary sourcing area.

WEST/MEXICO

Rounds: The temperatures late last week reached near 110 in the growing regions. By the weekend highs were near 85. Highs are expected to be in the 90s all this week. Supplies are lighter but still able to meet tepid demand. FOB prices are stable on the 5x6s and 6x6s and up \$1 on 6x7s. Mexican crossings of vine ripens continue at Otay Mesa and McAllen. Crossings are up at Otay Mesa but down at McAllen. Quality is variable.

Romas: Crossings continue at McAllen and Baja. CA growers continue this week. Quality remains good but variable due to excessive heat. Prices are stable in CA and McAllen and are down around \$1 for Baja crossings depending on size.

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 deal is winding down.

WATERMELON

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.