

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending September 12, 2014

MARKET OVERVIEW

California avocado supplies are on the decline and prices are increasing. Pricing on larger size lemons are nearing historical highs with relief anticipated mid-September. Limes prices are somewhat lower this week with smaller sizes more abundant. Extremely tight supplies of grapefruit. Very light supplies continue on green and red leaf lettuce. Prices are on the rise for late-week shipments of iceberg; quality, head size and carton weight varies depending on shipper. Unseasonably warm nighttime temperatures in the coastal districts of central California have resulted in issues with seeders in lettuce and leaf items, and lack of head size and solidity in iceberg. Less than average supplies on several mixed vegetable items; however quality continues to be good to very good with prices on the rise. Lettuce prices are firm and still taking a moment to catch its breath. High processor demand is the main reason for the current strength in the market. There is an inordinately high percentage of small and puffy lettuce. Carton romaine is firm and steady. Hearts remain tight and expensive. Green leaf prices are steady and supplies are improving slightly. Broccoli remains incredibly tight, especially Asian crowns. Cauliflower prices are strong and prices are noticeably higher from early week. The celery market is gaining strength and the market has pushed higher since early week. Strawberry shippers always expect a production decline in the late summer. However, this year the drop has been sudden and severe. Demand far exceeds supply and shippers remain grossly oversold. Prices are still on the rise with no relief expected in the near term. Berry counts are in the mid to upper 20s per 1# clamshell.

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados—Californian & Mexican	Moderate	Good	↑
Blackberries & Blueberries	High	Good	↑
Strawberries	High	Good	↑
Raspberries	Moderate to Low	Good	↔
Grapefruit	Moderate	Good	↑
Lemons	Extreme	Good	↑
Oranges, Navels, Valencias	High	Good	↓↑
Limes	Moderate	Good	↓
Pineapples	Moderate	Good	↑
Green, Red Leaf & Romaine Lettuces	Moderate	Fair	↔
Iceberg Lettuce	High	Fair to Good	↑
Romaine Hearts	Moderate	Good	↓
Cucumbers	Moderate	Good	↔
Green Beans	Moderate to Extreme	Good	↔
Green Bell Peppers	Low	Good	↔
Red Bell Peppers	Moderate	Good	↓
Yellow Squash	Moderate to High	Good	↔
Zucchini	Moderate	Good	↔
Green & Red Seedless Grapes	Moderate	Good	↔
Peaches, Nectarines, Plums	Moderate	Good	↔
Cantaloupes, Honeydews	Moderate	Good	↔
Artichokes	Moderate to High	Excellent	↑
Asparagus, Peeled Garlic	Extreme	Good	↔
Arugula, Carrots, Frisee, Fennel/Anise, Mache, Baby Spinach, Spring Mix	Moderate	Good	↔
Parsley (Italian)	Moderate	Very Good	↔
Cauliflower, Napa	High	Good	↑
Broccoli	Moderate to High	Good	↔
Snow & Sugar Snap Peas	High to Extreme	Poor to Good	↑
Cilantro	Moderate	Very Good	↑
Celery	Low to Moderate	Excellent	↔
Red Cabbage	Moderate	Excellent	↓
Green Cabbage	Moderate	Good	↔
Parsley (Curly) & Spinach (Bunched)	Moderate	Excellent	↔
Bok Choy	High	Good	↔
Green Onions	Moderate to High	Good	↑
Kale (Green)	Low	Excellent	↔
Red, White & Yellow Onions	Moderate	Good	↔
Potatoes	Low	Good	↔
Round, Roma, Plum Tomatoes	Low	Good	↔
Grape Tomatoes	Low to Moderate	Good	↔
Red & Golden Delicious	Moderate	Good	↔
Galas, Granny Smiths, Fujis	High	Good	↔



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APPLES & PEARS

The California season is winding down; Gala supplies are nearly depleted. The transition from Washington storage season to the 2014-2015 new crop harvest is underway. Gala, Gingergold, and Golden Delicious stocks are available; Red Delicious volume is low. Sugar levels measure 12 to 14 Brix (sugar to acid ratio). California Bosc and Red Crimson prices are steady; the Bartlett season is wrapping up. New crop Washington Bartlett harvesting has begun; D'Anjous will be on the market later this week.

ARTICHOKES

Light supplies and increasing prices; 12s, 18s and 24s. Supplies should stay adequate to cover normal weekly business. Sizing this week is on the larger end with an emphasis on the 12s through 24s. Very good quality with tight, compact shape and good consistent color.

ARUGULA

Adequate supplies.

ASPARAGUS

Prices remain at the highs due to limited production volume in Mexico. Peruvian asparagus, available for shipment from Miami, offers good value at present.

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. Mexico has finished with old crop and now harvesting Flor Loca crop. Eating quality and the maturity of the fruit is very good. Predominant sizes are 48s and 60s. New crop will start up in September. Prices are on the upswing. Peruvian volume has been on the decline. Quality has improved and maturity levels are very good. Predominate sizes are 40s and 48s with some larger and some smaller. Even with the volume declines, prices should remain relatively stable.

BELL PEPPERS

Prices are easing due to increased California stocks. Quality is excellent: shape is elongated and flavor is sweet, yet peppery.

East: FOB prices are stronger this week due to tighter supplies and stronger demand. MI remains the primary growing region along with NJ and western NC. We are seeing improved quality but quality remains variable out of MI due to earlier rains.

West: Supplies and quality continue to be good but increased demand has put upward pressure on FOB prices compared to last week.

BLACKBERRIES

The market is beginning to climb; harvesting is winding down. The new crop Mexican season will start in October. Quality is good: texture is firm and flavor is sweet. Sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Prices are up; supplies are limited. Rain in the Pacific Northwest is causing late-season quality issues. Most growers will ship the 4.4-ounce clamshell until the new crop Argentine season starts in October. Quality is average: sugar levels range from 14 to 18 Brix.

BROCCOLI

The market remains elevated; stocks are tight. Hot weather has pushed harvesting ahead of schedule and caused a supply gap. Expect high prices for several more weeks. Quality is good, but problems include bracketing, pin rot, hollow core, and branching. The overall quality that is being packed shows a small to medium bead size, good green color and good texture. Lighter supplies are still projected industry wide in Salinas and Santa Maria due to these quality issues. Crews are being diligent to minimize what is packed. A slight increase in production is anticipated within the next two weeks.

CABBAGE

Cabbage supplies are limited with Georgia being done. Cabbage is available in N.Y.

CANTALOUPE

Market is steady with good supplies of 9's and tighter on 12's and smaller. The overall quality of the fruit is very good with some very clean netting and beautiful interior color and sugar. We will be harvesting through mid-October and then transition to the desert through November.

CARROTS

Steady availability from California, Michigan and Mexico.

CAULIFLOWER

Demand has improved forcing the market to increase. Production will continue to be below average for the next few weeks. Quality is good with majority of 9s and 12s available.

CELERY

Average supplies and slow demand in the west; competing with home grown areas in Canada and Michigan. Quality in Salinas is excellent; dark green with very meaty stalks and weights between 58-60 lbs.



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CILANTRO

Steady supplies this week with excellent quality and appearance. Bunches are approximately 9-11" in length with good green color.

CUCUMBERS

East: MI continues to be the major growing region. Quality is improving but still variable due to rain. FOB prices have shown signs of strengthening this week but we do not believe that the market will hold as NC and SC have begun their fall harvest. Quality out of these fields is good.

EGGPLANT

East: Supplies coming from MI and western NC. Demand is moderate. FOB prices are steady to weaker.

West: Supplies much tighter this week with higher FOB prices. Demand is moderate.

FENNEL/ANISE

Fennel supplies are slightly below demand for this week. Market should remain strong this week with steady prices.

GARLIC

The shortage situation continues. Volume from China is down substantially due to tariff increases for the majority of importers. This has resulted in a large increase in demand for California and Mexican growers. Although a few containers from China have arrived on the West coast recently, demand will continue to exceed supply. Market participants anticipate an increase in volume from China in the near term, however this has not yet materialized. In addition to the shortage of Chinese garlic, there are fewer planted acres in California, further contributing

GRAPEFRUIT

All supplies except 27s larger are extremely tight; virtually no availability. The only real availability is on 23s.

GRAPES

Market is steady with good supplies of all colors and excellent overall quality with very good sugars and snappy fruit. We are in the peak of our harvest and we will continue to have good supplies of good quality fruit through November barring any major weather issues.

GREEN BEANS

Adequate supplies in the East, tight availability and high prices in the West.

GREEN CABBAGE

Overall production for the past few weeks has slowed down due to cool weather in Salinas. Supplies are average with no excess. Demand will remain strong for the next week.

GREEN ONIONS

Extremely tight supplies. This trend should continue through the end of next week. Overall supplies are currently at summer volume, but not enough to cover demand this year. Medium size is predominant while jumbo size is non-existent. Quality is good.

HONEYDEW

Market steady with good supplies of larger fruit and tighter on the smaller sizes overall quality is excellent with nice clean exterior and with a green to cream cast and excellent internal color and sugars, we will be harvesting through mid-October and then transition to the desert.

ICEBERG LETTUCE

The market remains elevated. High temperatures continue to cause problems with aphids and mildew; growers are trimming damaged outer leaves, resulting in lighter, paler lettuce. WCF Iceberg Lettuce is limited due to low weights and insect pressure; packer label will be substituted as needed.

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. FOB prices are steady.

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 exceeds supply on all sizes and grades. We are packing fruit from Mexico and Dist. 2 (Coastal); we will start our new Dist. 3 crop around the third week of September, which will help ease the pressure and hopefully get things back to some normalcy. The overall quality is fair at best and fruit is a little on the weak side as the maturity is higher than we like to see in some blocks.

LETTUCE (GREEN & RED LEAF)

Although stocks remain tight, the market is stable. High temperatures have caused quality problems like insect pressure, mildew, and fringe burn. WCF Green Leaf is sporadic; packer label will be substituted as needed.



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LIMES

The market is unchanged; supplies are sufficient. Quality is good: no major problems are being reported.

NAPA

Good availability and favorable prices from selected shippers.

ONIONS

Market is steady and FOB's are holding for now. There is a good balance between supply and demand. Most all onions are now coming out of Idaho and Oregon. Trucks are tight in the Northwest.

ORANGES

Market very strong as demand exceeds supply on 88's and smaller and will continue to be in that situation until we start California navels around the end of October. We will do all we can to cover all orders but might need to look at loading touching sizes at times when we have no small fruit. The overall quality is fair to good with fruit showing some re-greening, and also some softer fruit as the trees and fruit are very stressed with the limited water availability.

PARSLEY (CURLY)

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

PARSLEY (ITALIAN)

Plentiful supplies this week. Quality is very good though occasional light bacterial spotting and bunches are averaging 9-11" in length with a rich, dark green color.

PINEAPPLES

The market is stable despite weeks of tight stocks. Volume has finally begun increasing. Overall quality is very good, but some supplies are exhibiting soft spots. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Norkotahs: Availability is tighter on larger sizes. Harvests producing smaller potatoes and with the lack of demand for smaller, sheds are unable to run enough volume to produce large quantities of medium size to large size counts. FOB's although low are firm for now. **Burbanks** should start to be harvested in about 2 weeks.

RASPBERRIES

The market is steady to slightly lower than last week. Stocks are adequate; new varieties are being shipped,

improving quality. The Mexican season will start in late November/early December. Sugar levels are high, ranging from 13 to 14 Brix.

RED CABBAGE

Plentiful supplies with average demand. Quality is great with good sizing and decreasing prices.

ROMAINE HEARTS

Average supplies this week. Demand continues to be good. Overall quality is good, but misshapen or slightly twisted heads with occasional tip/fringe burn is being seen. Crews are being diligent to minimize what is packed. This problem is industry wide out of central California.

ROMAINE LETTUCE

Prices are average; stocks are adequate in California and other regional areas. Quality problems like fringe burn, insect pressure, internal burn, mildew, and seeders persist. WCF Romaine is sporadic; packer label is being substituted as necessary.

SALADS & BLENDS

The market is level. Raw product quality remains very good despite inconsistent weather. Inspectors are working closely with processors to ensure good quality product is packed in WCF cartons.

SNOW AND SUGAR SNAP PEAS

Adequate supplies on snow peas (Peru, Guatemala, Mexico); tight availability, poor quality and high prices for sugar snap peas.

SPINACH (BABY)

Adequate supplies.

SPINACH (BUNCHED)

Shorter supplies than normal. Spinach bunch length will be a bit shorter than normal measuring 7- 9 inches with cartons weighing around 20 lbs. Quality is excellent featuring dark green, full bunches measuring slightly shorter between 7-9 inches and 20 lb. carton weights.

SPRING MIX

Prices are stable. Hot, humid nights are causing some problems such as aphids, heat-related defects, and mildew. Maintaining the cold chain is critical to shelf-life, particularly in the summer.



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SQUASH (YELLOW)

East: Continue harvesting out of SC and NC with light volume. NJ and MI continue to be the major suppliers. The GA and Quincy fall harvest is just beginning. FOB prices remain generally steady from last week. Quality is improving but still variable. Scarring is seen on much product.

West: Supplies are light and quality is fair to good due primarily to scarring. Harvesting is primarily from the Santa Maria area. Like the east, FOB prices remain steady from last week.

SQUASH (ZUCCHINI)

East: Limited supplies available from SC and NC. NJ and MI are major providers. GA and Quincy fall crops have just begun. Quality is good and demand is moderate.

West: Supplies continue from Baja. Santa Maria region is harvesting. FOB prices show upward pressure.

STRAWBERRIES

Prices are steady. The Salinas/Watsonville season is ending; stocks are diminishing. New crop Santa Maria fruit is now on the market, yet will remain tight for a few weeks. Quality is fair: many berries are smaller than normal and overripe. 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 ripers) are all still producing. Demand nationwide continues unusually weak. FOB prices for all sizes have fallen. Quality is still generally very good. We see good volume in the East into September unless rains interrupt.

Romas: The roma market is the one tomato commodity that is showing some signs of strength as supplies in both the east and west have fallen somewhat this week. Primary harvesting areas continue to be Western NC, the Eastern Shore of VA and MI. The level of demand will have the biggest impact on FOB prices. Currently, FOB prices are up on all sizes from last week. Quality remains very good.

Grapes: Supplies from VA, TN, NC, SC and AL continue strong. FOB prices generally steady to down slightly. Quality remains very good. Demand continues weak.

Cherries: Supplies continue to be relatively tight. FOB prices are steady from last week. Quality remains very good. The Eastern Shore of VA is the primary sourcing area.

WEST/MEXICO

Rounds: Supplies continue to be strong as demand continues to be weak. FOB prices are weak again this week on all sizes. Quality is very good. The weather has been excellent for growing tomatoes with highs in the low 90s. We see good supplies continuing at least through mid-September. Mexican crossings of vine ripers continue at Otay Mesa and McAllen but at lower levels at McAllen. Quality is variable and so are FOB prices, depending on quality.

Romas: Crossings continue at McAllen and Baja but at slightly lower volume. CA growers continue this week. Quality remains good but variable. Demand is moderate. FOB prices are up on all sizes and from all regions.

Grapes: Crossings from Baja and McAllen continue. Crossings are a little lighter this week at McAllen. We see no major gaps in grape supplies for the foreseeable future with steady low FOB prices. Quality is good to very good.

TREE FRUIT

(PEACHES, NECTARINES, PLUMS, CHERRIES)

Although the season is ending, prices are holding steady. Nectarines will remain available through next week; the peach season will end in mid-September, and plums will be on the market until early October. Quality is very good: fruit is sweet and juicy. Sugar levels range from 12 to 13 Brix.

WATERMELON

The market is expected to remain stable for several weeks; production is sufficient. Fruit is deep red, firm, and sweet. Sugar levels range from 12 to 14 Brix.