



FRESH DIRECTIONS

PRODUCE TREND REPORT FOR WEEK ENDING SEPTEMBER 26

WEST CREEK FRESH



MARKET OVERVIEW

September will bring another transition period for avocados; more volatility as demand is hampered by supplies. California strawberry shippers have experienced volume shortages during the months of August and September due to several key "Act of God" factors affecting growers: labor, temperatures, drought and shortage; demand exceeds supply. Prices are expected to increase over the next few weeks. Pricing on larger size lemons are nearing historical highs with relief anticipated mid-September. Very light supplies continue red leaf lettuce. Growth rates have slowed, and quality concerns are higher than usual on lettuce, spring mix, romaine, spinach and arugula depending on shipper. Below average or light supplies continue for many mixed vegetable items; however, quality continues to be to very good with steady prices. Above normal nighttime temperatures and high humidity continue along the California's central coast. Overnight humidity is 90% or higher and temperatures are in the high 50s. Strawberry supplies are insanely tight. No degree of pre-booking can eliminate prorates. The lettuce and leaf markets are fairly steady. Celery prices have the chance to rise moderately by early to mid-next week.

Hurricane and Tropical Storm Update- Hurricane Odile, tied for the strongest hurricane of record to hit Mexican Baja, slammed into the southern part of the peninsula Sunday night and moved northward right along its spine. The storm packed winds of over 125 mph and brought up to 18 inches of rain over a large track. Odile was downgraded to a tropical storm Monday night but still packs a powerful punch as it starts to induce a moisture surge into the southwestern U.S. which will produce high winds, heavy rains and flash flooding. Another storm, T.S. Polo has formed behind Odile and tropical storm watches have been posted along the Mexican Pacific coast. The current forecast calls for this storm to develop into another hurricane but stay slightly off the coast. We will continue to monitor this storm and bring you updates as conditions warrant. The effect of these storms is higher fob tomato prices, especially in for the Roma category. The short term rise in prices is not too dramatic. However, the real effect of these storms will be felt in October, November and maybe later as younger plants are hit hardest and plantings are being delayed.

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

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APPLES/PEARS

Demand and movement very strong, supplies tight all grades on small sizes, especially reds. Sizing coming off the 1st picks are mostly 100's and larger, Making it difficult to secure supplies for school business. Quality is extremely good which is producing mostly premium grade while old crop product is holding up well on what is left. Braeburns, Cameos, Pink Ladys will come off the first couple weeks of October, and just about everything else has started.

ARTICHOKES

Lighter supplies this week. Prices are steady and quality is excellent with good consistent color and tight compact heads. Supplies of large and small loose continue to be very limited.

ARUGULA

Currently experiencing issues with flowering and yellowing leaves.

ASPARAGUS

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

AVOCADOS

California avocados are excellent in quality, flavor and oil content with predominate sizing of 40s and 48s and some 60s. Fruit will ripen very quickly without proper refrigeration. California growers are rapidly winding down this year's season. The Flora Loca crop in Mexico is winding down these first two weeks of September. Rain in Mexico has not helped harvesting, but volume on the new crop (Aventejada) will increase on a weekly basis; predominately 48s and 60s. Prices continue to rise. Peru is finishing their harvest; minimal volume in September. Predominate sizes are 40s and 48s.

BELL PEPPERS

Red and Yellow: Prices are stable; California stocks are sufficient. Quality is excellent: shape is elongated and flavor is sweet, yet peppery.

Green:

East: FOB prices are stronger again this week due to tighter supplies and stronger demand. The northern growing areas of MI, NJ and NY are winding down with variable quality. The eastern NC fall crop has begun. The GA fall crop should start in a couple of weeks.

West: Supplies and quality continue to be good but increased demand has put slight upward pressure on FOB prices again compared to last week. Quality has continued to be good but we will see how the storms affect quality in the future.

BLACKBERRIES

Producing regions are Santa Maria, Watsonville, Salinas, Baja, Oxnard, Oregon and Washington. Weather driven issues such as mold have been reported. Inspection of the fruit is now being performed at field and dock level in the PNW. Keep fruit at 32-33 degrees. Conventional product is declining as well as organic. Berry Valley production continues to increase.. Sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Producing regions are California, Baja, Oregon and Washington. Some reports of soft fruit. PNW is unpredictable this time of year with heat and rain. The weather impacts availability and quality. Conventional volume is anticipated to decline. Berry Valley will be the majority of the blues available. 4.4 oz. is the main pack size. Sugar levels are high, ranging from 14 to 18 Brix.

BROCCOLI

Lighter supplies this week and slightly below demand. A small amount of pin rot and hollow core is still seen in production. 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 2 weeks.

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CANTALOUPE

Market is strengthening on all sizes as we are slowing down on production and we will see things continue to strengthen through the end of the month until we start some production out of the desert for the fall melons. The overall quality is very good with high sugar and excellent internal color and nice clean net.

CARROTS

Steady availability from California, Michigan and Mexico.

CAULIFLOWER

Supplies slightly above demand this week. Quality is fairly good; medium size, off-white in color, light green jacket leaves and weights of 26-28 lbs. Majority of 12s are available each day; 16s and 9s are limited.

CELERY

Strong supplies and demand. Quality is excellent with dark green with very meaty stalks and weights between 58-61 lbs.

CILANTRO

Below average supplies are expected for the next week to 10 days. Quality and appearance remain nice. Bunches are approximately 9-11" in length with good green color.

CUCUMBERS

East: MI continues to be the major growing region but rains are taking a toll. Quality is variable due to the rain. NC, SC and GA have started to harvest their fall crops. FOB prices are generally steady. Quality out of these fields is good.

West: Baja rain has disrupted harvesting which has affected supplies and has caused western FOB prices to be stronger this week.

FENNEL/ANISE

Fennel supplies are slightly above 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 increase in demand for 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 to the lack of supply.

GRAPEFRUIT

Grapefruit is finished in California.

GRAPES

Market is strengthening as we are harvesting several very nice varieties of reds and greens; the overall quality is excellent with good sugar and eating quality. We will continue to harvest through November barring any major weather issues. We should continue to have excellent quality and this is a great time for promoting California grapes.

GREEN CABBAGE

Cooler temps have slowed production down slightly this week. Demand has increased.

GREEN LEAF/VARIETY LETTUCE

Average supplies of green leaf, but very short on red leaf this week. Green and red leaf are expected to weight 22-23 lbs. per case and 9-11" in length.

GREEN ONIONS

Green onions remain on the tighter side due to supplies. The Mexican holiday and Hurricane Odile will hamper supplies even more this week with the possibility of rain in Mexicali (halting any production).

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HONEYDEW

Market is steady to strengthening as production numbers are slowing as well as we have about another 3 weeks to go on the Westside and market will continue to strengthen. The overall quality is excellent with high sugars and great internal quality with some scarring on fruit that is from the northern district. Will be transitioning to desert soon.

ICEBERG LETTUCE

Light supplies this week and projected for next. Quality is good and the volume of 30s higher than normal. Mildew and sclerotinia remain present (normal for this time of year) with some seeders. Otherwise, good green color and texture, medium to medium plus head size and weights of 38-44 lbs.

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. Slight upward pressure on FOB prices.

KALE (GREEN)

Plentiful supplies this week. Overall quality and appearance continues to be very nice with bunches and lengths measuring 14-16" and dark green color.

LEMONS

Market very strong and DEMAND EXCEEDS SUPPLY on 140's and larger with most of the fruit coming out of Dist. 2 (Coastal) and smaller with fruit left on the tree is on the smaller side, we have started to harvest in a light way out of Dist. 3 (Desert) but have had some rains that have kept us out of the fields on and off as the fruit has to be dry in order to harvest, if the fruit is wet at all they will spot when we gas the fruit to bring on the color. We will hope to be ramped up with Dist. 3 fruit in the next 7-10 days and will hopefully start to see the situation ease up a bit and overall

quality improve. The overall quality of the fruit is fair at best with the fruit being very mature the strength of the fruit is on the weaker side.

LIMES (PERSIAN)

Full loads of robust limes with excellent quality are available. Shipping from Ventura County, CA, Hidalgo County, TX and Lancaster County, PA.

ONIONS

Quality very good from the Northwest on all colors. Probable softening of FOB's as more onions are being harvested. Extreme tight truck situation is preventing movement of product.

ORANGES

Market very strong as DEMAND EXCEEDS SUPPLY on 88's and smaller and we will continue to be in this situation through the end of October until we start California navels. We know this is very discouraging for all and we will work our way through this and do the best we can together to get this behind us. The overall quality is FAIR at best as this fruit we are picking is about 16 months old and has been through a freeze and is not getting the desirable amount of water to the trees as they are also carrying next year's crop as well and the fruit and the trees are very stressed and the strength of the fruit is weak and not what we are used to.

PARSLEY (CURLY)

Good volume expected for the next several weeks. Quality continues to be very nice. Bunches are measuring 8-10" in length with good dark green color.

PARSLEY (ITALIAN)

Reduced supplies this week. Quality is good and bunches are averaging 10 -12" in length with a rich, dark green color.

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PINEAPPLE

Prices are average despite low volume. Supplies should start increasing this week.

Overall quality is very good, but some lots are exhibiting soft spots. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Large sizes remain tight. Midrange and smaller sizes are available and fob's have stabilized.

Trucking situation is TIGHT!!!!!!

RASPBERRIES

Producing regions are Baja, Oxnard, Watsonville, Santa Maria and Salinas. Quality is good overall. The current variety contributing the largest percentage of production is producing high quality fruit. Improved quality assurance actions will continue at both the dock and field level.

RED CABBAGE

Plentiful supplies with average demand with many local deals slowing down. Market is steady and quality is excellent.

ROMAINE

Supplies are steady for the next few weeks while demand is good industry wide. Continued weather related issues such as mildew, fringe/tip burn and irregular head sizing. Weights are 36-37 lbs. per case and each head 11-12" in length. Crews are being diligent to pack only the best heads.

ROMAINE HEARTS

Average supplies this week. Demand is average. Overall quality is good with the exception of misshapen or slightly twisted heads with occasional tip/fringe burn. Crews are being diligent to minimize what is packed. This problem is expected to continue for the next few weeks.

SNOW AND SUGAR SNAP PEAS

Snow peas and sugar snaps are in tight supply (Peru, Mexico); prices remain at the highs for both. Quality is poor and limited availability will continue.

SPINACH (BABY)

Adequate supplies.

SPINACH (BUNCHED)

Steady supplies with good demand and strong market. Quality is excellent (aside from some loose yellow leaves in banded area of bunches) with weights between 21- 23 lbs., large bunch sizes with full lengths of 9-11" and very dark green color.

SPRING MIX

Availability has returned to normal.

SQUASH (GREEN)

East: Light supplies available from SC and NC. MI continues to supply but, like the yellow, supplies are winding down quickly. GA and Quincy fall crops continue with light volume. Quality is good and demand is moderate. FOB prices are up slightly from last week.

West: Supplies are tighter. Santa Maria region is still harvesting. FOB prices up sharply due to limited supplies.

SQUASH (YELLOW)

East: Continue harvesting out of SC and NC with light volume. MI continues but is quickly winding down due to rains. The GA and Quincy areas continue to begin with light volume. Tighter supplies are causing FOB prices to be slightly higher than last week. Quality is variable. Scarring is seen on much product.

West: Supplies are light and quality is only fair primarily due to scarring. Harvesting is from the Santa Maria and Fresno areas. Nogales will be starting to pick later this week with light volume. Like the east, FOB prices are higher compared to last week.

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STRAWBERRIES

Producing regions are Santa Maria, Watsonville, Salinas and Oxnard. Planted acreage for the fall crop in Oxnard (Southern California) has decreased significantly due to the shortage of water.

Strawberries will be in tight supply until early 2015, when harvesting will resume in Central Mexico. Inspections are being conducted at the field level for bruising/decay; possible lighter availability than anticipated. Warm temps early in the week have caused an increase in bruising both internally and in the market. Quality is expected to continue to improve with increased production of new crop. Keep fruit at 32-22 degrees. Conventional product is projected to decline considerably and organic to tighten up over the next few weeks.

TOMATOES

EAST

Rounds: Supplies continue from several growing regions in the east but with less volume as vines are getting older and we come toward the end of several crops. Western NC and SC, TN, NJ, MI, and AL (vine ripens) are all still producing. Our VA Eastern Shore fall crop has begun and a few tomatoes have started be harvested out of Quincy, FL. FOB prices for all sizes are up. We are beginning to see some quality issues as it relates to shelf-life as we come toward the end of several crops. We see this varying quality as a possibility for the next three weeks. Therefore, we encourage that inventories be kept close.

Romas: There is a supply shortage of Romas nationwide. They are tight in the east, and due to the storms, they are tight in the west. We reported last week of a roma gap situation in Baja. The storms will exasperate that problem. FOB prices this week are stronger than last week. Primary harvesting areas continue to be Western NC and the Eastern Shore of VA. Quality is fair to good.

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

Cherries: Demand weak, supplies steady. FOB prices are generally steady. Quality remains good. The Eastern Shore of VA is the primary sourcing area.

TOMATOES

WEST/MEXICO

Rounds: The storms discussed above will have an effect on the Western crops for months to come. The initial effect will be modest for next week. However, we do see more issues with gaps and shortages in October and November as a result of these storms. Volume is down per acre as the crop gets older. Some growers are only working 3 days per week. Mexican crossings of vine ripens continue at Otay Mesa and McAllen. FOB prices are higher.

Romas: Of all of the tomato commodities, Romas are the tightest category nationwide. We reported last week of the planting gap in Baja. The storms will make this gap more pronounced. Crossings continue at McAllen but are very tight. CA FOB prices are up moderately. Quality remains good but more variable. Demand is moderate. FOB prices up rather sharply at Otay Mesa and more moderately at McAllen.

Grapes: Crossings from Baja and McAllen continue. FOB prices up slightly but are still at very low levels. Quality remains good but we will keep a close watch on it to see how the storms might affect it.

TREE FRUIT

The nectarine market is inching up, the peach market is slightly lower, and plum prices are stable. The California season is nearly finished. Quality is very good: fruit is sweet and juicy. Sugar levels range from 12 to 13 Brix.

WATERMELON

Prices are steady. California supplies are increasing, but fewer overall acres were planted due to water shortages. Fruit is deep red, firm, and sweet.