

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending October 24, 2014

MARKET OVERVIEW

Supplies are tight on red cabbage. As a result of the continued warm weather in Central California, growth rates have slowed, supplies have decreased and quality concerns remain higher than usual on lettuce, spring mix, romaine and several mixed vegetable items (depending on the shipper). The outlook is generally positive in quality and production for all berries, except blackberries which are expected to be tight for another two to three weeks. After months of successful production of summertime tomatoes, we have begun the transition back to the winter season growing regions (Florida/Mexico). Unfortunately, we have compounding weather events that have dramatically reduced the supply of all field-grown tomatoes. Several hurricanes have destroyed crops in the southern Baja region, and torrential rains in the traditional western Mexico growing regions have delayed plantings by as much as three weeks. Warmer temperatures throughout the entire California growing season have sped up the production plantings by three weeks causing the glut of production the last few months and ending the season early for most growers. Cold temperatures and rain in the eastern homegrown deals have effectively ended the production in that region. North Florida which is usually a strong point for October tomato production has been devastated by rain and hot weather. The farms in this region will only produce 35% of expected normal production. The Ruskin/Palmetto crop is going to be late as well. We believe that volume will not begin until around November 15 due to excessive rains and heat. Over 25 inches of rain in Ruskin in the month of September alone.

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



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APPLES & PEARS

The Washington market is low; crunchy, juicy; new crop apples are plentiful. Sugar levels are high, measuring 14 to 18 Brix. The Pink Lady variety will be on the market in late October. Washington Pear prices are low; Bartlett and D'Anjou stocks are plentiful. Quality is excellent: fruit is crisp and sweet, yet slightly spicy.

ARTICHOKES

Fair supplies available this week. Quality is excellent, and prices are steady. Supplies of large loose and small loose continue to be very limited. Availability is best on 12s and 18s.

ASPARAGUS

The market is slightly higher than last week. New crop harvesting in Baja, Mexico has started; supplies will increase by the end of the month. Peruvian stocks are ample, but demand is strong. Flavor is grassy and stalks are straight.

AVOCADOS

Prices have leveled; Mexican stocks are increasing, but growers are holding back supplies to prevent the market from dipping. Quality is best in Mexico, but oil content is low, causing firm texture and grassy flavor.

BELL PEPPERS GREEN

East: FOB prices are generally steady in the east with tight supplies. The eastern NC fall crop continues. The GA fall crop is also producing but excess rain has affected the quality out of this region. Crops will be starting next week in Central and South FL.

West: Market is active. Demand is stronger as the east continues to look west to meet demand. FOB prices up slightly on all grades and sizes.

RED & YELLOW

Prices are forecast to stay steady for several weeks; California stocks are adequate. The Mexican season will begin soon, increasing supplies and easing the market. Quality is excellent: shape is elongated and flavor is sweet, yet peppery.

BLACKBERRIES

The market will remain high until new crop Mexican supplies increase. Both domestic seasons are nearly over. Overall quality is fair at best due to recent rains. Sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Prices are elevated; the Pacific Northwest season is ending. New crop fruit is available in California and

Mexico. Harvesting will begin in Argentina later in the week. Berries are sweet: sugar levels range from 14 to 18 Brix.

BOK CHOY

Tight supplies, high prices.

BROCCOLI

The market is near the bottom, making this an ideal time to buy. Supplies are abundant in California and Mexico (into South Texas), but a harvesting gap is expected to start next week. Quality is excellent: buds are tightly packed, color is dark green, and texture is crisp.

CANTALOUPE

Market is very tight as we have finished on the Westside and have slowly transitioned to the Fall desert deal. We have started to harvest in a very light way out of Yuma and Phoenix, but with the monsoon rains that we have experienced quality is fair with some sunken areas and occasional ground scar and some mud still on the fruit. The internal condition is very good with nice meat, good sugar and color. We should be in better shape with cleaner fruit by the first of next week and hopefully some better overall volumes. We will have fruit out of the desert through November and then offshore will be here to take over.

CARROTS

Availability has tightened for jumbo carrots in California as size and yield have declined, the result of a slower growth cycle during the late season fall harvest at higher elevation (2,150 ft.) in the Cuyama Valley of Southern California. Prices will trend higher until the harvest returns to the Southern San Joaquin Valley (Bakersfield).

CAULIFLOWER

Shipments continue to be strong. The forecasted volume this week is average. Prices are on the rise as supplies increased along with lighter production; high temps slowed down harvest crews. Quality is very nice; white curds, medium plus size and good green jacket leaves.

CELERY

Supplies are average with the warm weather occurring. Production is expected to increase next week. Overall quality is excellent with 60-62 lbs., dark green color and meaty. Sizing continues to be on the larger side.

CILANTRO

Supplies are down from last week. Quality and appearance continue to be very nice. Bunches are averaging 9-11" in length and showing good, green color. Prices are on the rise.



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CUCUMBERS

East: NC, SC, and GA continue to harvest their fall crops. The GA region has continued to see a lot of rain. FOB prices are down as more supplies are available. Quality is variable. The Plant City crop is about to ramp up.

West: Supplies are stronger, especially through Nogales. FOB prices are down. Quality is improving but is still variable.

EGGPLANT

East: Most supplies are coming from GA. Market is steady to down slightly.

West: Market is slightly stronger.

FENNEL/ANISE

Expect the market on fennel/anise to possibly become more active in the next few weeks with this time of year when there is an increase in fennel demand industry wide along with lighter supplies. Currently, supplies are below demand for the week.

GARLIC

Not much has changed. 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 exceeds supply. A limited supply of garlic is currently available; however volume is much less than normal. A judicial ruling is expected next week regarding the release into the market of Chinese garlic that is being held in port. The current shortage will not be relieved until more Chinese garlic becomes available.

GINGER

There is a supply and demand situation that happens from time to time with ginger. The crop in storage is tight and the new crop will be in the US around mid-January. This is causing a lack of supply and very high prices.

GRAPEFRUIT

California-Arizona grapefruit is scheduled to start at the end of October.

GRAPES

Market is strong with fair to good supplies of fruit on both colors, the overall quality is excellent with great sugar and nice firm fruit. We are starting to slow down harvest, but will continue through mid-November and hopefully have fruit to ship through December to bridge the gap between Chilean arrivals. We should start to see the first of the Chilean arrivals around the third week of December.

GREEN BEANS

Continued tight availability and high prices in California. The harvest transition from the San Joaquin Valley to Coachella is underway. Beans from Mexico will be available in Nogales by mid-November. Availability in the East is better by comparison than Virginia and Georgia. Rain-caused supply gaps are anticipated for Eastern growers periodically through November.

GREEN CABBAGE

Production volume for the week ahead is expected to be steady. There have been no quality issues from the heat over the past 10 days.

GREEN ONIONS

Tight supplies continue for green onions. Prices are average on all packs and sizes.

HONEYDEW

Market very strong as we have finished the Westside and have transitioned to the desert and also Mexico, the overall quality is fair to good as they have also been through the rains in Mexico as well as the desert. We will continue to see volumes increase over the next few weeks and quality will continue to get better each week as well. The overall internal color is excellent and sugars are good out of both regions.

ICEBERG LETTUCE

Lettuce volume will be above average this week. Higher than normal inventories has caused pressure on the market. Once the inventory is sold, prices may firm up into a moderate range. Quality is revealing some damage from the heat; weak tip, misshapen heads, ribby, occasional seeder and insect damage. Quality is expected to improve by mid to late next week. Salinas's lettuce is winding down and will finish by the end of October and transition to Yuma at the beginning of November. Some shippers are starting to pack in Huron this week.

JALAPEÑOS

East: FOB prices are generally steady. Quality is good. Sourcing from GA.

West: Supplies out of Baja and San Maria continue but at lower levels. Quality is very good. FOB prices higher. FOB prices are steady out of McAllen.

KALE (GREEN)

Supplies are plentiful again this week. Overall quality and appearance continues to be nice. Bunches are averaging 14-16" in length and showing good texture and color.



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KIWI

New crop California kiwi is now available. The crop size is expected to be somewhat normal this year; however ongoing drought conditions will continue to play a role in the size profile, yield and overall production.

LEMONS

Market has eased a bit as we are going with good volume out of dist. 3 and there continues to be Mexican and Chilean fruit in the marketplace as well. We will have good volume going forward with much better quality than you have been seeing. The color is very good and the rind is tight and clean, the internal color is very good with excellent juice content. We will continue with dist. 3 fruit through March and should start some dist. 1 fruit by the later part of November which will help with supplies as well.

LETTUCE (GREEN & RED LEAF)

Supplies are average this week on mix leaf items. Quality is strong for both green and red leaf with weights ranging from 22-24 lbs. per case and 9-10" in length per head.

LIMES (PERSIAN)

The market has increased on 200s and smaller. The market on 175s and larger has decreased. Good supplies are available.

NAPA

Limited supplies, high prices.

ONIONS

FOB's on all three colors remain soft, as more onions are being harvested than there is demand for. Prices are expected to stabilize over the next few weeks as growers can slow down their supply; they will be coming exclusively out of storage.

ORANGES

Market steady as we are finishing up on Valencia's and trying to get started on new crop California navels. The overall quality of the Valencia's is fair with some re-greening and softness; the internal condition is very good with excellent sugar and juice content. The first of the navels look good externally with a light yellow to orange color (a little checkerboard color), the internal condition is good, just not near the juice or sugar content of a Valencia. We will have good supplies of navels by the end of next week and will transition from Valencia's to navels by the 27th of October.

ORANGES (TEXAS/FLORIDA)

Florida should have some limited supplies by the end

of this week. Texas has started in a small way. Good volume continues this week.

PARSLEY (CURLY)

Supplies are down from last week. Quality and appearance is still very nice, and bunches are averaging 8-11" in length with dark green color.

PARSLEY (ITALIAN)

Plentiful supplies this week. Overall quality and appearance continues to be very nice. Bunches are averaging 9-11" in length and exhibiting dark green color.

PINEAPPLES

The market is starting to inch down as supplies become more readily available in Costa Rica and Mexico. Quality is very good, although softness continues to be a slight problem in some lots. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Norkotah prices are level; supplies are ample. Expect skins to be set after the sweat process in two more weeks. Moisture content will fall and solids will rise, making potatoes better for baking and frying. All size cartons have tightened up as harvest is winding down, and growers are focusing on storing the remainder of their crop. Mid-range and smaller sizes are in better supply than larger size cartons, yet there is supply in Washington. We are seeing a two-tiered pricing structure as both Burbank and Norkotah varieties are being shipped, with Burbank garnering higher returns.

RASPBERRIES

The California market is steady; Oxnard supplies are meeting demand. Quality is very good, although some lots still contain soft, bleeding berries. Sugar levels are high, ranging from 13 to 14 Brix. New crop harvesting will begin in Mexico in late November/ early December.

RED CABBAGE

The market remains strong with very light supplies. Quality is excellent with great color and slightly smaller sizing.

ROMAINE HEARTS

Supplies are below average this week due to the warmer than normal temperatures. Supplies are expected to decrease as the Salinas season comes to an end. Demand is good. Color, cupping and condition are good. Lengths are 10-11" with 25-26 oz. weights.



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ROMAINE LETTUCE

Supplies are above average this week due to warmer than normal temperatures for some California shippers, while others will be very short for this week and next. Demand is steady. As the warm weather continues, the heads start to twist and portray a slightly ribby appearance. Color is dark green with 11-13" lengths and weights of 36-38 lbs.

SALADS & BLENDS

Heat-related quality problems such as pinking and shortened shelf-life are major concerns.

SNOW AND SUGAR SNAP PEAS

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

SPINACH (BABY)

Adequate supplies.

SPINACH (BUNCHED)

Supplies are strong this week, and quality is very nice with good green color and 21-23 lb. bunches. Lengths are 10-11". Demand is decent with steady and moderate pricing. There is the possibility for a gap to occur between the Salinas and Yuma transition due to the warm weather.

SPRING MIX

Prices are unchanged; volume has increased despite some lingering heat-related problems. Maintaining the cold chain is critical to shelf-life. Higher respiration rates are causing moisture in some bags.

SQUASH (ZUCCHINI)

East: Supplies are stronger in the east with NC, SC, GA and north FL all still producing. Large zucchini is becoming available for the first time in several weeks. FOB prices are lower.

West: More supplies crossing at Nogales. Downward pressure on FOB prices.

SQUASH (YELLOW)

East: More supplies are putting downward pressure on FOB prices again this week. Continue harvesting out of SC and NC with light volume. The GA and Plant City areas are producing more. Quality is better but still variable.

West: More volume crossing at Nogales is causing downward pressure on FOB prices in the west.

STRAWBERRIES

California prices are stable. Production is underway in Oxnard and Santa Maria, but quality is suffering from weeks of extremely high temperatures; many berries are small and soft. Sugar levels remain elevated at 14 to 15 Brix.

TOMATOES

EAST

Rounds: Supplies have reached a critical shortage due to weather events that have occurred in all tomato growing regions. This is the time of year we always expect a supply gap but the situation is exacerbated this year. We expect this gap situation to last until the middle or end of November, at which time good volume should start to come out of Central FL. FOB prices are up sharply and may continue to go higher during the next several weeks until supplies from Central FL ramps up around mid-November.

Romas: Supplies continue to be extremely tight in the east. The east is having to look west to meet all of its demand. FOB prices are up sharply. Quality continues to be good.

Grapes: Supplies are much shorter this week. FOB prices are up sharply again this week. Quality remains good.

Cherries: Demand weak, supplies down. FOB prices are up sharply again this week. Quality remains good.

WEST/MEXICO

Rounds: Supplies are critically short in the west also—both in CA and MX. CA's season will come to a complete end shortly. Larger sizes are particularly short and all sizes are running on the minimum side. FOB prices are up sharply on all sizes. Mexican crossings of vine ripens continue at Otay Mesa, Nogales and McAllen but at less volume and higher FOB prices. Quality is variable.

Romas: Supplies continue to grow tighter in the west. Like the rounds, the roma crops are nearly at the end. Many growers have already finished for the season. One or two growers may go through the end of the month. FOB prices are up sharply on all sizes. Quality is variable.

Grapes: Supplies are tight. Limited crossings from Baja, McAllen and Nogales. CA also continues with very light volume. FOB prices are up sharply. Quality is variable.

TREE FRUIT

The nectarine and peach seasons have ended. Sporadic quantities of plums will remain on the market this month, but essentially the season is over. Quality is very good:



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fruit is sweet and juicy. Sugar levels range from 12 to 13 Brix. New crop Chilean fruit will be on the market in January.

WATERMELON

The market is elevated due to limited supplies in mainland Mexico (into Nogales). Hurricanes and heavy rains have reduced new crop yields greatly. Prices should start easing in two to three weeks. Quality is very good: melons are deep red, firm, juicy, and sweet. Sugar levels are high, ranging from 12 to 14 Brix.