

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending November 14, 2014

MARKET OVERVIEW

Quality and availability issues for leafy greens are expected to continue for the duration of the Salinas growing season (through mid-November, at which point the growing region transitions to Yuma). Unseasonably warm temperatures have caused crops to grow approximately 7-12 days ahead of schedule, and due to water shortages, very little lettuce was planted in Huron, California this year. Growers are now confirming a supply gap, though many are attempting to purchase additional acreage in the hope of compensating for drastic shortages. Look for red leaf, green leaf, broccoli, and cauliflower to follow suit. With these extreme market conditions in mind, we will be seeing industry wide price increases for leafy greens.

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



FRESH DIRECTIONS



APPLES & PEARS

Washington prices are low; stocks are especially ample for the 2014-2015 season. Sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). Supplies are sweet, crunchy, and juicy. Washington Bartlett and D'Anjou prices are low; new crop volume is high. Quality is excellent fruit is crisp and sweet, yet slightly spicy.

ARTICHOKES

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

ASPARAGUS

The market is steady. Volume continues to increase in Baja, Mexico. Peruvian supplies are ample, yet size remains inconsistent. Flavor is grassy and stalks are straight.

AVOCADOS

The market is level. Chilean supplies are limited. Mexican stocks are plentiful, especially large sizes; as is typical for this time of the season, fruit may take longer to ripen. Skins may remain greener than normal when mature.

BLACKBERRIES

Prices will continue to ease as new crop Mexican stocks increase. The California and Pacific Northwest seasons have ended. Quality is very good in Mexico fruit is firm and juicy. Sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Production has ended in California. The market is finally starting to inch down. Although volume is low, new crop supplies are starting to become more abundant in Argentina and Mexico. Flavor is sweet sugar levels range from 14 to 18 Brix.

BROCCOLI

Despite average prices, the market is expected to rise over the next two weeks. California growers are moving production south to Yuma, Arizona for the winter season. Overall quality is excellent, but hollow core and occasional bracketing are minor issues.

CANTALOUPE

Market has eased a bit as production out of Arizona is peaking this week and volume will start to decline next week which will cause the market to strengthen back up. The overall quality is fair to good with some ground scar, uneven netting and checkerboard color, but mostly a green cast with excellent internal color and good sugar. We should harvest through November and then transition into offshore fruit.

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

The market will remain high through Thanksgiving; volume is low as growers prepare to transition to Yuma. Quality is very good texture is firm and color is snowy white.

CELERY

Although prices are low, they are expected to rise over the next two weeks as Thanksgiving demand ramps up. Quality is excellent texture is crunchy and flavor is peppery with a hint of apple.

CILANTRO

Plentiful supplies available from California and Mexico. Quality is very nice with bunches averaging 9-11" in length with good green color.

CUCUMBERS

EAST: Upward pressure on FOB prices continue as the GA crop is over and the FL growing regions start up slowly. This is especially true with selects. We do see more volume coming on line shortly. Quality is variable.

WEST: Prices generally steady but with upward pressure due to weather and the northern growing season ending. Quality is also variable.

EGGPLANT

EAST: Limited supplies are coming from GA. Market is much stronger with FOB prices up by.

WEST: Market is stronger in the west also with FOB prices up. Most product is passing at Nogales.



FRESH DIRECTIONS



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 Chinese 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 remains tight, and the new crop will be in the U.S. around mid-January. This is causing a lack of supply and very high prices.

GRAPES

Market is steady and strengthening as we are starting to slow down our harvest and with the 1" of rain we had over the weekend any fruit that was not covered is probably not going to get harvested due to the rain damage. We have fruit in storage that will help us get through the middle part of December and hopefully through the whole month we just have to see how things hold up. The overall quality is good with some lighter color showing on some of the red varieties but overall fruit eating quality is excellent with very high sugars.

GREEN BEANS

Prices continue to slowly ease from recent highs in the West (Coachella). Plentiful supplies in Florida and Georgia. Mexican beans will become available in Nogales next week.

GREEN CABBAGE

Good supplies with various regions in production, including Colorado, Michigan, North Carolina and California. Cabbage is clean with a very nice color and dense appearance.

GREEN ONIONS

Growers in Mexico are in the recovery phase following the hurricanes of September and early October; production volume is on the increase, and prices are trending lower. Green onions are expected to be in good supply for Thanksgiving.

HONEYDEW

Market is steady as production is coming from Arizona and Mexico with better supplies of Mexican fruit showing up and lighter supplies of Arizona being harvested. The overall quality is fair to good with green to cream cast and some ground scar and light netting showing up, but internally condition is excellent with high sugars and excellent color. We will continue with Mexican fruit going forward and Arizona will be finishing in the next few weeks. Then we will transition into Mexico and offshore fruit only going forward.

KALE (GREEN)

Plentiful supplies continue this week. Overall quality and appearance continues to be very nice. Bunches are averaging 12-14" in length and showing good texture and color.

LEMONS

Market is adjusting as we are picking in dist. 3 (California desert) and will start in a light way in Dist. 1 (Central Valley) in the next 2 weeks. There is still some Mexico fruit crossing which is of fair quality with a fair amount of brown rot and high maturity type fruit, the Mexico fruit should be finished in the next 10 days or so which will help to stabilize the market as the Mexico fruit has created a split market. We expect to have good supplies of lemons going forward with very good quality coming out of both districts for the next several months.

LETTUCE (GREEN LEAF)

Although Salinas stocks remain abundant, prices will rise until growers complete the move to Arizona (by mid-November). Quality is very good, but insect pressure and outer leaf decay are slight problems.

LETTUCE (ICEBERG)

Prices are extremely high; stocks will remain limited until production moves to Arizona next week. Quality problems include light weights, premature pinking, and shortened shelf-life.

LETTUCE (ROMAINE)

Strong demand and limited supplies are keeping the market high. Most growers will move production to Yuma by mid- to late November. Quality is fair problems include internal burn, fringe burn, and seeders.



FRESH DIRECTIONS



ROMAINE HEARTS

Below normal supplies this week with weather related quality issues; tight supplies will continue through mid-November.

LIMES

Prices should stay steady for another week or two, then begin rising due to strong holiday demand and light winter plantings.

ONIONS

Prices remain near the bottom of the market due to abundant stocks. Pacific Northwest onions are crunchy, well-formed, and have bold flavor.

ORANGES

Market is adjusting as we have transitioned into new crop California navels, the overall quality is very good for this early in the season with brix as high as 12.0 and will only continue to get better in the coming weeks. We have cooled down and our nights are getting in the low 40's which is helping to bring on color which will allow us to decrease our gassing hours. The overall crop looks very good with a nice mix of sizes throughout the valley, and we will have good supplies through April and then we will probably start to see things tighten up as our industry volume is lighter than normal.

PARSLEY (CURLY)

Supplies are on the decline. Prices are moving higher.

PARSLEY (ITALIAN)

Italian parsley is in great supply. Availability is generally stable. Prices are firming with the approach of the Thanksgiving holiday.

PEPPER (GREEN BELL)

EAST: FOB prices are generally steady but with downward pressure. Good volume out of GA and Central and South Florida. Good quality from all regions.

WEST: More supply available from Nogales. We do not anticipate a gap situation as we move from the desert to Nogales. FOB prices are generally steady.

PEPPER (JALAPEÑOS)

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

WEST: Small gap situation discussed last week still exists causing strong (but steady) FOB prices. We look

for good volume to start up next week which should put downward pressure on FOB prices at that time.

PEPPER (RED & YELLOW BELL)

The market is stable; California supplies are plentiful. Expect prices to inch up until Mexican volume reaches normal levels in early December. Quality is excellent shape is elongated and flavor is slightly sweet.

PINEAPPLE

The market is stable; stocks are sufficient in Costa Rica and Mexico (into South Texas). Quality is excellent fruit is firm, sweet, and juicy. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Most stocks have completed the sweat process. Expect potato texture to be fluffier and better for baking through the end of the season (next summer). Prices are on the rise and size profile is on the smaller side. Continued tight availability on carton-packed Idaho Russets (large sizes 40s thru 70s). Cool, wet growing conditions that occurred during August have caused a reduction in yield for the large sizes during the early harvest. Growers are hoping for increasing size from later fields. Other growing regions offer better alternatives for large sizes, including Washington, Oregon, Nebraska and Wisconsin.

RASPBERRIES

Prices are unchanged; expect the variety now being shipped to be darker in color. Sugar levels are high, ranging from 13 to 14 Brix. New crop fruit from Mexico is now on the market.

RED CABBAGE

The market remains strong with light supplies and very good demand. Quality is excellent with great color and medium head size. Prices remain high.

SALADS & BLENDS

Prices are rising. Recent rain has caused quality problems like pinking, creasing, light color, and shortened shelf-life.

SNOW & 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.



FRESH DIRECTIONS



SPINACH (BABY)

Adequate supplies.

SPINACH (BUNCHED)

Demand is fair, and supplies are below average as growers are ahead of production schedule. Overall quality is good with large, full bunches and weights of 21-23 lbs.

SPRING MIX

The market is unchanged, but last week's rain has caused quality problems such as dehydration and erratic shelf-life. Expect these problems to persist until growers move south to Yuma in mid- to late November. Maintaining the cold chain is critical; higher respiration rates are causing moisture in some bags.

SQUASH (GREEN)

EAST: Supplies continue to be strong this week with GA and FL the major producers. Demand is also good. FOB prices are weak and generally steady.

WEST: As with the yellow, supplies of green squash is being hampered by the weather. FOB prices are higher by several dollars. Quality is good.

SQUASH (YELLOW)

EAST: Supplies continue to be good this week causing FOB prices to remain weak and generally steady. Supplies from GA to south FL are available. Quality is good.

WEST: Cooler weather and rains from the tropical storm are temporarily hampering supply causing FOB markets to become stronger. Most supplies are crossing at Nogales. Quality continues to be good.

STRAWBERRIES

Expect the market to climb through the month of November. Despite average stocks, quality continues to suffer in Oxnard and Santa Maria due to last month's extremely high temperatures and last week's rain; many berries are small, soft, and light in color. Fruit is not as sweet as normal, but sugar levels are forecast to increase over the next several weeks.

TOMATOES

EAST:

Rounds: Supplies continue to be short but have significantly improved over the past two weeks. The Ruskin region is starting up with moderate volume. Quality is fair to good due to grade factors. Sizing is good. We expect volume to increase at a slow rate until around Thanks-

giving at which time full production should be reached. Our Immokalee crop is coming along well and we should start to harvest from this region the first week of December. Demand is moderate and steady. Depending on how much the west is forced to come east to meet their demand will have a large factor on how the eastern FOB market responds in next several weeks. FOB prices are down from last week, depending on size.

Romas: Supplies continue to be tight in the east but are improving. The Palmetto/Ruskin area is the sourcing region. FOB prices are steady with downward pressure. Quality continues to be good.

Grapes: Supplies have come on strong this week causing a drop in the FOB price on the 12/1 pint flats. Quality remains good.

Cherries: Demand weak, supplies up slightly causing FOB prices to fall. Quality remains good.

WEST/MEXICO:

Rounds: As predicted, the rain and much cooler temperatures last Friday put an end to the CA crop. (One grower may try to salvage his last 30 acres.) The quality of the fruit in the ripening rooms from this region is fair at best. Larger sizes are particularly short and all sizes are running on the minimum side. FOB prices are down on all sizes. Mexican crossings of vine ripens continue with light volume at Otay Mesa, Nogales and McAllen. Quality is variable. Rain and storms from TS Vance is expected this week which will interrupt harvesting.

Romas: The CA crop is finished. Crossings are down. In fact, some days no fruit is available. The FOB market is stronger due to fewer supplies. Romas continue to cross at Baja but quality is only fair. A few romas continue to cross at Nogales as that region continues to ramp up. As we have previously reported the Nogales crop remains late due to earlier storms.

Grapes: Supplies are tight. CA is finished. Limited crossings from Baja, McAllen and Nogales. Nogales has started and we expect a good supply from there by Thanksgiving. Demand is sluggish. FOB prices are weaker compared to last week. Quality is variable.



FRESH DIRECTIONS



TREE FRUIT

Peaches and Nectarines are finished. There are very few plums left. Mostly 35VF & larger left on red plums and 45VF and larger left on black plums. There are good supplies of pomegranates, persimmons, kiwi, pears (Oregon Bartlett's). Fair supplies on Fuji and Pink Lady apples. Good supplies on Granny Smith apples and Asian pears.

WATERMELON

Although the market is high, stocks from mainland Mexico (into Nogales and South Texas) are starting to increase. Last month's hurricanes destroyed many crops. Expect prices to inch down as the month continues. Melons are deep red, firm, juicy, and sweet. Sugar levels are high, ranging from 12 to 14 Brix.