

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending November 21, 2014

## MARKET OVERVIEW

The carrot market is advancing quickly and will stay robust for the next two to three months. The drought has forced growers to reduce acreage and the hot summer reduced yields. Quality and availability issues continue for leafy greens and many mixed vegetable items as Salinas comes to a close and Yuma begins. Demand has increased with the approach of the Thanksgiving holiday. Processors recently enacted Act of God clauses. Yuma is now the primary shipping point for Iceberg lettuce, romaine and green leaf. Initial quality is superior to the last Salinas shipments, however Iceberg lettuce sizing is somewhat smaller. The dynamics of today's Iceberg lettuce market will remain intact until at least Thanksgiving. Romaine will continue to ride the coattails of the Iceberg market and follow closely behind. Broccoli, cauliflower and mix items will begin in Yuma the week of November 17. Celery will continue loading in Salinas through the Thanksgiving pull. The Salinas berry season is over and the strawberry market is limited and decreasing in supply weekly. Trucks must now load berries in Oxnard.

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



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## APPLES AND PEARS

The Washington market is stable; growers have completed harvesting and are shipping from controlled-atmosphere storage. Sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). Supplies are sweet, crunchy, and juicy. The Washington harvest is complete; all fruit will come from controlled-atmosphere storage for the rest of the year. Quality is excellent: fruit is crisp and sweet, yet slightly spicy. Sugar levels range from 12 to 14 Brix.

## ARTICHOKES

Lighter availability as temperatures are much cooler now in Salinas. Quality is excellent, prices are steady. The best availability is on 30's, and 36's. Supplies of 12's and 18's are very light. Supplies of large loose and small loose to continue to be very limited. Prices are higher on 12's, 18's, and 24's. Steady prices on 30's and 36's.

## ASPARAGUS

Although prices are level, the market is expected to climb later in November due to holiday demand. Flavor is grassy, texture is crisp, and stalks are straight.

## AVOCADOS

The market is unchanged. Although Chilean stocks are tight, there is an ample supply of Mexican fruit. Large, 48-count avocados are limited, but there are plenty of 60- and 70-count supplies on the market. It is normal for fruit to take longer to ripen at this time of the season; skins may remain greener than normal when mature.

## BLACKBERRIES

The market will inch down as new crop Mexican supplies become more plentiful. This growing region will be the main supply source through May. Quality is very good in Mexico; fruit is firm and juicy. Flavor is sweet; sugar levels range from 12 to 13 Brix.

## BLUEBERRIES

High prices persist. Expect the market to inch down when volume increases in Argentina and Mexico. The Chilean season will start in mid-December. Flavor is sweet; sugar levels range from 14 to 18 Brix.

## BOK CHOY

Tight supplies, high prices.

## BROCCOLI

The market is expected to start climbing this week. California growers are transitioning to Yuma, Arizona for the

winter season. Overall quality is excellent, yet hollow core and occasional bracketing are slight problems.

## CANTALOUPE

The market has eased a bit as volumes in Mexico and Arizona peaked this week and will start to decline next week which might strengthen things up. The overall quality is some of the best we have had in the desert this fall as the plants have recovered from the rains and fruit is much cleaner than the past month. The internal quality is very good with excellent sugar and color and a more consistent netting and color.

## 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

An elevated market is forecast through Thanksgiving; stocks are decreasing as growers make the transition to Yuma. Quality is very good: texture is firm and color is snowy white.

## CELERY

Prices will continue to climb until strong holiday demand subsides in early December. 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:** Supply and demand is generally steady with little change in FOB prices. Quality is variable.

**WEST:** FOB prices are showing upward pressure. Quality is variable.

## EGGPLANT

**EAST:** Limited supplies. Market is generally steady from last week's relatively high FOB prices.

**WEST:** Market continues to be relatively high in the west also. Most product is passing at Nogales.





# FRESH DIRECTIONS



## **FENNEL/ANISE**

Steady availability for most sizes with reasonable prices.

## **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 to strengthening as we are slowing down our harvest and will be pulling most of our product from storage going forward and hopefully we can make it through December on our California fruit. The first of the Chilean arrivals will be around middle part of December. The overall quality of the fruit is still very good with some light color showing on the crimsons, but overall sugar and fruit strength is very good.

## **GREEN BEANS**

Production is limited in all growing areas. Florida will have light supplies through November.

## **GREEN CABBAGE**

Salinas's production is finishing up with great condition and weight. Yuma is ready to harvest by the end of the week.

## **GREEN ONIONS**

Green onions are in plentiful supply for the Thanksgiving holiday. Quality is best out of Mexico. Markets range low for pencils, moderate for both medium and extra large sizes.

## **HONEYDEW**

Market has eased as Mexico's production has increased and the Arizona and California fruit is finishing up this

week. We will continue to see Mexican fruit crossing through around the end of December depending on the when they get the first freeze. The overall quality is good with some ground scar and sunburn showing up for the most part the Mexican fruit is pretty clean.

## **KALE (GREEN)**

Plentiful supplies continue. Overall quality and appearance continues to be very nice. Bunches are averaging 9-11" in length and showing good green color.

## **KIWI**

New crop of 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 unsettled as there is still fruit from Mexico and Chile, and we are also harvesting in dist. 3 (desert) and starting in a light way out of Dist. 1 (Central Valley) which will slowly pick up volume in the coming weeks. The overall quality of the California fruit is very good with excellent color and shape and juice content. We expect to have a lighter than normal crop in the Central Valley, but will have ample supplies to carry us through May barring any major weather issues.

## **LETTUCE (GREEN LEAF/VARIETY)**

The market is slowly climbing. California supplies remain ample, but growers are moving to Yuma. Quality is very good, yet insect pressure and outer leaf decay are minor issues.

## **LETTUCE (ICEBERG)**

Production has started in Arizona. Quality problems include light weights, premature pinking, twisting, and shortened shelf life.

## **LETTUCE (ROMAINE)**

Prices are elevated. Most growers are in transition from Salinas to Yuma this week. Quality is best in Arizona, but volume is low. California problems include internal burn, fringe burn, and seeders.

## **LETTUCE (ROMAINE HEARTS)**

Steady to below normal supplies this week with some weather related quality issues of seeders and occasional twisted heads.



# FRESH DIRECTIONS



## LIMES

The market will start climbing next week; holiday demand is strong and winter plantings were below normal.

## ONIONS

The market is low. Pacific Northwest onions are crunchy, well-formed, and have bold flavor.

## ORANGES

Market is steady as we are going on New crop navels and there are a few Valencia's still left around but should be cleaned up by the end of next week. The overall navel quality is very good for this early in the season, with very good sugar and low acid, we are still gassing 3-5 days to bring on the color so you will see some spotting and checkerboard color in the box. We expect to have a very nice quality crop through the year and praying for rain to help size some of the fruit up as we are peaking on smaller fruit.

## PARSLEY (CURLY)

Supplies continue to decline. Prices continue to increase.

## PARSLEY (ITALIAN)

Currently, supplies are steady and expected to remain so for the next several weeks. Quality and appearance continues to be very good with 9-11" inches in average length.

## PEPPER (GREEN BELL)

**EAST:** FOB prices are higher on all sizes and grades this week after falling for several weeks. A little volume is still coming from GA but most is now coming from FL. Good quality from all regions.

**WEST:** FOB prices are also up on all sizes and grades in the west. Nogales is now the major sourcing crossing point.

## PEPPER (JALAPEÑOS)

**EAST:** FOB prices are stronger due to fewer supplies. Quality is good.

**WEST:** A gap situation still exists with stronger FOB prices. We look for good volume to start up soon which should put downward pressure on FOB prices.

## PEPPER (RED AND YELLOW BELL)

California supplies are plentiful, yet the market is forecast to slowly rise until Mexican stocks are on the market in early December. Quality is excellent; shape is elongated and flavor is slightly sweet.

## PINEAPPLE

Prices are stable, but will start to rise as the holiday season begins; supplies are adequate 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)

The majority of Burbank supplies have completed the sweat process. Texture is now fluffier and better for baking. Demand is strong enough to keep supplies moving out, and FOB's are firm. Trucks are extremely tight.

## RASPBERRIES

The market is stable. California stocks are abundant; new crop Mexican fruit is increasing. Sugar levels are high, ranging from 13 to 14 Brix.

## RED CABBAGE

Salinas red cabbage is finishing and starting in Yuma the first of December. Current condition is very large and heavy. Prices remain high though movement has slowed somewhat.

## SALADS & BLENDS

The market is up. Inconsistent California weather has caused quality problems like pinking, creasing, light color, and shortened shelf life. Growers will move all processing to Yuma by the week of November 24.

## 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)

Demand remains fair and market steady. Overall quality is excellent with 21-23 lbs., full bunches and lengths of 10-11." Salinas's production is finishing and Yuma is expected to start on Monday with lighter numbers for the first week.

## SPRING MIX

Prices are stable. Although supplies are plentiful, inclement weather has caused quality problems like dehydration and erratic shelf life. Production will start moving south to Yuma next week.



# FRESH DIRECTIONS



## SQUASH (GREEN)

**EAST:** Same story as with the yellow squash with sharply higher FOB prices.

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

## SQUASH (YELLOW)

**EAST:** After weeks of low FOB prices, they took a steep jump this week due to a wind storm several weeks ago which blew blooms off the vines. This is causing a small gap situation in the crop.

**WEST:** FOB prices are also stronger in the west due to decreased supplies. The growing regions were hurt by rains and supplies are running several weeks behind.

## STRAWBERRIES

Prices continue to climb. Rain followed by hot weather has caused quality problems and decreased supplies; widespread problems include bruising, mold, small size, and soft texture. Expect high prices through the month of December when volume will increase in Coachella, California.

## TOMATOES

### EAST

**Rounds:** FOB prices continue to drop slowly as a little more volume comes on-line from the Ruskin/Palmetto region. FOB prices are down on all sizes. We expect volume to increase at a slow rate until around Thanksgiving 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. The Ruskin/Palmetto crop has received over 30 inches of rain which is affecting quality. Quality will remain variable until our Immokalee crop begins.

**Romas:** Supplies are extremely tight in both the east and the west which is putting sharp upward pressure on FOB prices. Acreage is down in the east and the crop is running approximately two weeks behind the rounds. The Palmetto/Ruskin area is the current sourcing region. The Mexican roma crop, which has become the major source of winter romas, is running several weeks behind due mainly to the numerous tropical storms that have hit the growing regions.

**Grapes:** Florida supplies continue to increase which continues to put downward pressure on FOB prices which are down this week. Quality remains good.

**Cherries:** Supply and demand remain steady. FOB prices are up slightly from last week.

## WEST/MEXICO

**Rounds:** The CA crop is all but over for the season. Baja crossings are down and sizing is smaller. Nogales crossings are off to a slow start due to earlier storms. Quality is variable. The tropical storm mentioned last week did not hit the growing region as hard as expected and brought only rain.

**Romas:** The CA crop is finished. Baja crossings continue to decrease and sizing is down. Quality is only fair. A few romas are crossing at Nogales but that crop is running several weeks behind due to earlier storms and will not be at normal volume until early January.

**Grapes:** Supply of good quality is extremely tight. CA is finished. Limited crossings from Baja, McAllen and Nogales. Nogales has started slowly but we do not expect a good supply from there until mid-December.

**Cherries:** Critically short supplies of quality product. Less expensive product is available from Otay Mesa but quality is very suspect.

## TREE FRUIT

All sizes are available on red plums and 45VF and larger available on black plums. There are good supplies on persimmons, pomegranates, and Asian pears.

## WATERMELON

Prices will remain high until supplies from mainland Mexico (into Nogales and South Texas) increase in late November. This fall's hurricanes destroyed many crops. Melons are deep red, firm, juicy, and sweet. Sugar levels are high, ranging from 12 to 14 Brix. The offshore season will begin in three to four weeks.