

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending November 28, 2014

MARKET OVERVIEW

Demand on most items has increased with the approach of the Thanksgiving holiday. Light availability continues on artichokes, cauliflower, herbs and spinach. Supplies are plentiful on cilantro, parsley, kale and green onions. Avocados overall are limited and decreasing in supply weekly. Vegetable growers east of Yuma in Tacna, AZ reported lettuce ice the mornings of November 17, 18 and 19. Lettuce ice prior to Thanksgiving is a rare occurrence. Supplies are average and prices have lowered on iceberg and romaine. Increased lettuce production combined with an increasing number of shippers have resulted in the recent market downturn. The lettuce market appears to be reestablishing traction near current levels. The Thanksgiving pull will conclude for eastern destinations by late this week and linger into Monday, 11/24 for west coast receivers. Demand exceeds supply for transportation equipment in the Northwest (WA, OR, ID), the greatest shortfall in memory. The Thanksgiving holiday, Christmas tree season and a large apple crop have combined to create this truck shortage.

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



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APPLES & PEARS

Demand, along with movement, is steady. Supplies are tight on all grades of small fruit, and prices are firming. Fruit is running heavy to the larger sizes. Quality is extremely good and producing lots of premium and WXF. Prices on Red Delicious and Gala apples are very attractive on 88s and larger. Storages are full. Weather is turning colder and should put an end to remaining harvest. Pear demand is very good, especially for 110s and smaller. Supplies are tight on these sizes. Crop is running heavy to U.S. #1, peaking 90s and larger. Trucking continues to be difficult, rates are extremely high and Christmas trees have started. Expect trucks to remain tight through the holidays.

ARTICHOKES

Very light availability continues for this week as temperatures are much cooler in Salinas. Quality is excellent, and prices are higher on all sizes. Supplies of large loose and small loose continue to be very limited.

ARUGULA

Steady availability.

ASPARAGUS

New crop asparagus from Mexico is now available. Availability has improved, with plentiful supplies anticipated by next week.

AVOCADOS

Size structure continues to improve on 48's and larger, deals on smaller fruit are drying up. Pricing and volume should remain stable this week. Maturity is improving every week, but fruit will have a tendency to remain green when ripe, and have a thicker skin making it difficult to detect ripeness. Lenticel damage is evident (normal for this time of year). California is complete on their season. Early season fruit may arrive in late December. Chile has a lower volume crop and they are finding better markets domestically and in Europe.

BLACKBERRIES

High elevation districts in Central Mexico have become the primary source; quality and availability are steady.

BLUEBERRIES

Conventional volume remains low. Three global growing regions are now in the production mix; Mexico and Argentina, with Chile coming online in early December. Quality has improved overall.

BOK CHOY

Tight supplies, high prices.

BROCCOLI

Supplies of bunch material are readily available in Salinas while crown material is the majority being harvested in Yuma. Quality is good however, expect to see an increase in stalk size on bunched. Demand is steady.

CANTALOUPE

High prices persist; the Arizona/California desert season is ending. Guatemalan fruit is available on the East Coast. The Mexican season will run through December.

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

Supplies in Salinas will be well below average again this week as the season comes to an end by the end of November. Quality continues to remain strong overall with a majority of 9s and 12s. Demand is strong due to the approach of Thanksgiving. Quality is very good with white curds, uniform size and good green jacket leaves.

CELERY

Steady supplies with strong demand due to the Thanksgiving holiday push. Salinas will finish by next week. Currently, the majority is on 30s and 36s with few large celery (24s) available. Weights are between 58-60 lbs. with dark green color and meaty shanks.

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: Supplies are short and FOB prices are higher by several dollars compared to last week. Quality is variable.

WEST: FOB prices are showing upward pressure. Quality is variable. Supplies available from San Diego and Nogales.



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EGGPLANT

EAST: Limited supplies. FOB prices are stronger by a couple of dollars regardless of grade.

WEST: Market continues to be relatively high in the west also. Most product of quality is crossing at Nogales.

GARLIC

In the past few weeks, some Chinese pounds have become available in the market. Although, pricing still remains high, it is anyone's guess whether more pounds will continue to become available or if "the pipeline" will run dry again. While U.S. Customs allowed some Chinese importers to have their pounds released (after being held at ports for long periods), promises were not made to have additional/new shipments released as well. Moreover, some importers may now be thinking twice about sending further shipments so soon, when they had such a difficult time getting the previous containers released. Time will tell. On the domestic side, the demand continues to remain high and supplies tight.

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

Green seedless are extremely active. The market is advancing, and most shippers will finish by the end of the month. Red Globes and black seedless are getting in fewer hands and will clean up quickly. There are good supplies of red seedless with a wide range of sizes and prices.

GREEN BEANS

Demand exceeds supply in the West, with a harvesting gap developing in the West, as the Coachella season winds down. Nogales will not be in full production until mid-December. Availability is tight in the East, as Florida is not yet up to full production.

GREEN CABBAGE

Yuma green cabbage supplies are strong and expected to remain so for the next week. Size and weights are very nice with good color and density.

GREEN ONIONS

Green onions are in plentiful supply for the Thanksgiving holiday. Pencil prices have increased to a more moderate range along with mediums and extra-large.

HONEYDEW

Prices are unchanged. Although the domestic season is ending, Mexican supplies are increasing. Guatemalan fruit will be on the market next week. Sugar levels range from 9 to 10 Brix.

KALE (GREEN)

Plentiful supplies continue. Overall quality and appearance continues to be very nice. Bunches are averaging 14-16" in length with dark green color.

KIWI

Chile is the main supply area. California is starting. Italian is available off East Coast and will be available on the West Coast in a week.

LEMONS

Lemons are peaking on 165/140/200 with fruit sizing up slightly. Starting to see market increase on small 235/200 size with this increase. Fruit is peaking heavier to fancy. District 3 (Desert) fruit is peaking 140/115/165 at this time; large fruit 115 and bigger continue to be tight. Seasonal demand has slowed and some market areas still have Mexican fruit available. Lemons market still continues strong on larges. This situation is expected to change over the next few weeks as sizing structure increases.

LETTUCE (GREEN AND RED LEAF)

Average supplies this week. Quality is very good on both green and red leaf with 22-24 lbs. per case and 10-11" heads.

LETTUCE (ICEBERG)

All shippers are now packing in Yuma. Quality is improving although weights are still below normal. Thirty size lettuce supplies are just above average, demand has decreased and prices have lowered.

LETTUCE (ROMAINE)

Supplies will be close to normal this week, and steady supplies are expected for the next few weeks. Demand is slightly off. Color is dark green with 10-12" in length and weights of 34-35 lbs. Seeders are showing in the 2-4" range.

LETTUCE (ROMAINE HEARTS)

The majority of hearts are in Yuma with supplies still slightly below normal. Demand is steady. Some twisted heads are still being seen with rib discoloration from the weather. Color is light green with full cupping.



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LIMES (PERSIAN)

Limes are now very limited—mostly 110s/150s. Pricing is in the high twenties. If demand and supply continue as is, it is possible prices could rise into the fifties by the first of the year.

ONIONS

Demand is good and quality is excellent. There is an oversupply of onions. FOBs are steady, and there are no expectations of any increases in FOB pricing. TRUCKS ARE VERY TIGHT!

ORANGES

The California Navel market is inching down; new crop supplies are ample. Texas stocks are available also; this fruit is not as visually appealing, but flavor is sweet. Sugar levels range from 11 to 13 Brix.

PARSLEY (CURLY)

Supplies are steady this week. Salinas Valley crops will continue to harvest for two more weeks. Initial supplies out of Mexico are small but expected to improve in the weeks ahead. Quality is very nice with bunches of 8-10" in length with dark green color. Thanksgiving demand is high which has resulted in higher prices.

PARSLEY (ITALIAN)

Currently, supplies are steady out of Salinas Valley and Mexico. Quality and appearance continues to be nice with 9-11" inches in average length and dark green color.

PEPPER (GREEN BELL)

EAST: FOB prices are steady to lower compared to last week. The colder weather may change that. GA will be finished up this week with the rest of the supply coming from FL. Quality continues to be good.

WEST: FOB prices are steady to down slightly. Nogales is now the major sourcing crossing point. Quality remains good.

PEPPER (JALAPEÑOS)

EAST: FOB prices are stronger again this week due to fewer supplies. Quality is good.

WEST: The gap situation is easing and FOB prices are down by several dollars. Quality is good.

PEPPER (RED & YELLOW BELLS)

California prices are starting to climb; volume will diminish until the season ends. Harvesting will start in Mexico by early December. Quality remains excellent: shape is elongated and flavor is slightly sweet.

PINEAPPLE

Rainfall in Central America continues to cause issues with quality and availability. Tight supplies are now anticipated through Thanksgiving.

POTATOES (IDAHO)

Demand is strong enough to keep supplies moving out, and FOBs are firm. Trucks are extremely tight. Large sizes (40- to 70-count potatoes) are limited; the crop is dominated by small sizes.

RASPBERRIES

Great availability overall with good quality. Rain should not have an affect; fruit is grown under the protection of hoops. Oxnard, Santa Maria and Mexico round out the growing areas.

RED CABBAGE

Salinas red cabbage is finished, and Yuma will not begin for another 10 days. Typically this gap does not occur, but Salinas production has been ahead, while Yuma has not changed. Most specials have been packed in anticipation of a gap, but supplements may be necessary. Both head size and weights are heavy on the last of the Salinas harvest. Movement has been slow, but prices remain high.

SALADS & BLENDS

Prices have leveled. Most growers have made the transition from Salinas to Yuma, where quality is better; any suppliers remaining in Salinas will be fully moved by the week of November 24. Inspectors are working closely with harvesting crews to ensure the best product is packed in finished cartons.

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)

A cold front along with finishing in Salinas has caused light supplies beginning out of Yuma. Demand is strong and market has increased. Quality is very nice with large, full bunches with lengths of 9-11" and dark green color. Weights are 20-22 lbs.



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SPRING MIX

Steady availability. The spring mix market is stabilizing. Expect to notice continued improvements.

SQUASH (GREEN)

EAST: Same story as with the yellow squash. Sharply higher FOB prices with only fair quality. The cold weather is severely limiting the availability of the large size.

WEST: As with the yellow, supply of green squash is tight and is being hampered by the weather. FOB prices are sharply higher.

STRAWBERRIES

Limited availability overall. Conventional and Organic production DECREASING each week. Prices are very HIGH. With recent rain, strawberries are showing signs of rain damage. Quality prior to the rain was fair to good, but expect quality to be closer to fair as we finish out November. Anticipate the market to stay on the higher end until after Thanksgiving. Florida has planted less acreage this year, but volume and quality should increase as production increase in early December.

TOMATOES

EAST

Rounds: The cold weather gripping a large portion of the country is halting the recent slide of tomato FOB prices as the cold air reaches Florida. The cold temperatures will put an end to any clean-up harvesting going on in south GA and northern FL. The low temperatures tonight in the Ruskin/Palmetto area will get close to freezing and it will remain cold for the majority of this week. Temperatures will drop to near 40 tonight in the Immokalee growing region which will slow that crop from maturing. We do not expect any major damage to the crop in central or southern Florida tonight but it will slow the maturing of the crop in both regions. The Palmetto/Ruskin region has received more rain this week. In fact, that crop has received well over 30 inches of rain since being planted and that has affected quality. Quality will remain variable until our Immokalee crop begins. As we discuss below, the western crop is well behind schedule due to the hurricanes and tropical storms that have affected that region. This is causing a shortage on both coasts and as a result, we are seeing higher FOB prices on 6x6s and 6x7s of around \$1 over last week as of today. Fob prices of 5x6s are seeing upward pressure and are \$.50 higher compared to last week at this time. Some added supply will occur when our Immokalee crop begins which should be by the second week of December. Normal winter supplies across the country will not be available until

MX starts up with normal volume which may not be until toward the end of December or into January.

Romas: The roma market is in crisis. Contract trigger price points have been reached and an AOG has been declared. There are simply no supplies available from any growing region. The situation of the MX crop has been well documented (weather related). Because MX has become the major supplier of winter romas, the Florida growers have cut back substantially on acreage planted. This lack of acreage and the cold weather has cut supplies drastically. Re-packers are scrambling and looking for any size roma to pack. Color is lighter than normal. FOB prices are up over \$8 but very few are available regardless of the price.

Grapes: The cold weather and increased demand from other parts of the country are putting upward pressure on FOB prices this week. Look for prices to be up over \$4 on the 12/1pt. Quality remains good.

Cherries: Supplies are tight. There being no western supply is putting more demand on this eastern product. Like the grape tomato, the cherry FOB prices are up over \$3 compared to last week.

WEST/MEXICO

Rounds: The CA crop is over for the season. Baja crossings are down and sizing remains small. Nogales crossings are off to a slow start. Quality is variable. Monday was a national holiday and no harvesting occurred and therefore nothing crossed over on Tuesday. Volume remains extremely low for this time of year due to the hurricanes and tropical storms that went through the growing regions over the past 45 days. Many fields had to be replanted and that fruit will not start to be harvested until late December or early January.

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. FOB prices are currently up over \$7 from last week and continue to get stronger every day.

Grapes: Supply of good quality remains 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 at least mid-December. FOB prices are up over \$6 compared to last week and upward pressure continues.



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Cherries: For all practical purposes, there is no supply of cherry tomatoes in the west. Quality is suspect of any western product found.

TREE FRUIT

Red plums are finished. 45VF and larger are available on black plums. There are good supplies on persimmons, pomegranates, and Asian pears.

WATERMELONS

Rains in Mexican growing regions have affected supplies and size of available melons. Size profiles are heavy to 60 and 80 count bins. Central American supplies are scheduled to arrive in Miami, New Jersey and Texas during the next two weeks. Some supplies of seeded are available FOB Nogales. Mini Seedless are also available in light numbers, as several suppliers are winding down on their northern Mexico season.
