

FRESH DIRECTIONS

WEST CREEK FRESH



Weekly Produce Trend Report for Week Ending December 12, 2014

MARKET OVERVIEW

After 10-11 months of no rain in Southern California, the rainfall that has occurred has been welcomed. Wells are getting some water, soil is being replenished and reservoirs are starting to fill. Though a long way to go, at least it is a start. Tight supplies continue on artichokes, berries, cauliflower, green beans, peas, red cabbage, squash and tomatoes; cauliflower, strawberries and tomatoes being the most extreme markets. Supplies remain plentiful on cilantro, green onions and kale. Supplies are average on lettuce and romaine, and romaine prices have continued to decrease. Avocados overall are limited and decreasing in supply weekly.

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Mexican	Moderate	Good	↔
Blackberries	Moderate	Good	↔
Blueberries	High	Good	↔
Raspberries	Moderate	Good	↑
Strawberries	High	Fair	↑
Grapefruit	Moderate	Good	↔
Lemons	Moderate	Good	↓
Oranges, Navels	Moderate	Good	↓
Limes	Moderate	Excellent	↔
Pineapples	Moderate	Good	↑
Green & Red Leaf Lettuces	Moderate	Good	↑
Iceberg Lettuce	Moderate	Good	↔
Romaine Lettuce	Moderate	Fair	↓
Romaine Hearts	Moderate	Fair	↓
Green Beans, Cauliflower	High to Extreme	Fair	↑
Green Bell Peppers	Low to Moderate	Good	↔
Carrots	Moderate	Good	↑
Red Bell Peppers, Yellow Squash, Zucchini	High	Good	↑
Parsley (Curly)	Moderate to High	Very Good	↔
Green & Red Seedless Grapes, Bok Choy, Napa	High	Good	↔
Plums	Moderate	Good	↔
Asparagus	High	Good	↓
Cantaloupes	High	Poor	↑
Honeydews	Moderate	Fair	↑
Artichokes, Red Cabbage	High	Excellent	↔
Arugula, Frisee, Fennel/Anise, Mache, Baby Spinach, Spring Mix, Cucumbers	Moderate	Good	↔
Broccoli, Green Cabbage, Spinach (Bunched)	Moderate	Excellent	↔
Red, Yellow, & White Onions, Potatoes	Moderate	Good	↔
Snow & Sugar Snap Peas	High to Extreme	Poor to Fair	↔
Kale, Parsley (Italian)	Moderate	Very Good	↔
Celery	High	Good	↑
Cilantro	Low to Moderate	Very Good	↔
Green Onions	Low to Moderate	Excellent	↓
Peeled Garlic	Extreme	Good	↔
Round, Roma, Plum, Grape Tomatoes	Extreme	Poor	Unstable
Red & Golden Delicious, Galas, Granny Smiths, Barlett 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 steady. Fruit is running heavy to the larger sizes. Quality is extremely good and producing lots of premium and WCF. Prices on Red Delicious and Gala apples are very attractive, on 88s and larger. Storages are full. Sugar levels are high, measuring 14 to 18 Brix. 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. Quality is excellent: fruit is crisp and sweet, yet slightly spicy. Sugar levels range from 12 to 14 Brix. Trucks remain tight, but not as extreme as the last several weeks. Rates are steady. 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 steady 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

Although the smaller fruit is still a better value than 48s and larger, price difference has narrowed with 48s/60 only a few dollars apart. Deals on 60s and smaller are essentially finished. 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.

BERRIES

Very limited availability on strawberries, blackberries and blueberries. Southern California will continue to produce strawberries and raspberries through November and into the start of December, but supplies will remain extremely short on strawberries. Harvest production emphasis has begun to shift to Central Mexico harvests for late November and will continue through April, 2015. Central Mexico produces strong volume of strawberries, blackberries

and raspberries and now a developing crop of Driscoll variety blueberries. Distribution through the winter will be through McAllen, Texas and Yuma, Arizona. Production in Mexico peaks in January with strongest fruit at that time. In December, Dover Florida starts local strawberry production and will also carry mixed berry patch transfers from Mexico. Blueberries into Florida will come from Argentina then From Chile. Overall, berry production improves significantly into January and through March. In March and April, the transition back to domestic harvests will occur with movement back to California.

BLACKBERRIES

High elevation districts in Central Mexico have become the primary source; quality and availability are steady. Quality is very good: fruit is firm and juicy. Flavor is sweet; sugar levels range from 12 to 13 Brix.

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. Fruit is deeply colored, plump, and sweet; sugar levels range from 14 to 18 Brix.

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.

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. Anticipate the market to stay on the higher end. Florida has planted less acreage this year, but volume and quality should increase as production increases in early December. However, the rain may be a problem and will more than likely create issues with the Florida berry patch.

BOK CHOY

Tight supplies, high prices.

BROCCOLI

Supplies remain steady this week. Days are becoming shorter, thus broccoli is not growing as quickly as it has been. Lighter supplies are possible by the end of next week. Quality is very good with even bead sizing and dome shape.

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CANTALOUPE

We are still harvesting in the desert but will be finishing by next week, the overall quality is fair to good with mostly a green cast and good internal color, there are some ground scars and rough netting but good sugar. The offshore fruit has started to arrive on the east coast and we will start here in about 2-3 weeks as we are having some issues with the long shore man in the ports. We will keep you posted over the next few weeks as things will probably be pretty tight.

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 Cuyaman Valley of Southern California. Prices will trend higher until the harvest returns to the Southern San Joaquin Valley (Bakersfield).

CAULIFLOWER

The market is extreme. Lower than typical growth rates along with excessive demand and poor growing conditions will negatively impact supply and price in the coming days and weeks. A colder than normal end to the Salinas Valley growing season together with a higher than typical demand has caused a supply gap for cauliflower during the product's annual transition from Salinas Valley, California to Yuma, Arizona. Industry-wide shortages are to be expected for the coming days and weeks but are expected to subside by mid-December.

CELERY

Lower yields due to black heart issues in the Oxnard and Santa Maria growing regions. Quality is good with weights of 56-58 lbs., dark green color and meaty shanks. Demand and lower yields will keep the market strong along with the Christmas push. Sizing is a bit smaller in the fields.

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 continue to be short but should start to improve later this week. FOB prices steady to down depending on grade. Quality is variable.

WEST: Supplies are better and FOB prices are lower.

EGGPLANT

EAST: More supplies available causing lower FOB prices.

WEST: Supplies are more plentiful causing lower FOB prices. Most product of quality is crossing at Nogales.

FENNEL/ANISE

Supplies are equal with demand this week. The market is expected to remain stable over the next few weeks with good supplies available.

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

Market is strong as we are starting to finish up harvest and pulling from our storage fruit, the overall quality is good with a range in color, but overall condition is good and sugar is excellent. We will continue shipping California fruit through December as long as fruit quality holds up. There will be the first of the Chilean arrivals around the second week of December but will keep you in California fruit as price and size will be better. Green seedless sugar levels range from 17 to 18 Brix; red seedless sugar levels are even higher at 18 to 19 Brix.

GREEN BEANS

Demand exceeds supply in the West, with limited new-crop production in Nogales. Continued tight availability in Florida. Improved supplies are expected as we move further into December.

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GREEN CABBAGE

Average supplies this week. Temperatures have been cooler and demand has improved slightly this week. Expect large, heavy and dense product with great color.

GREEN ONIONS

Green onions are in plentiful supply and post-holiday deals have begun. Good supplies are expected through Christmas.

HONEYDEW

Market is steady with good supplies of 6 and 8's all out of Mexico the larger fruit is very tight and we will see the overall market start to strengthen up over the next 2-3 weeks as some of the Mexico regions are winding down and volumes will start to decrease over the next 2 weeks and will start to see some offshore fruit start to arrive in the next few weeks but volumes overall will be down. The overall quality is very good with good internal color and sugar. Sugar levels range from 9 to 10 Brix.

KALE (GREEN)

Plentiful supplies continue. Overall quality and appearance continues to be excellent. Bunches are averaging 12- 14" in length with good texture and 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

Market has steadied and seems to be firming up on 165's and smaller as we are peaking on 140's and larger out of the desert (dist. 3) and also starting to pack some in the central valley (dist. 1) there is also some Mexican and Chilean fruit around but within the next 2 weeks that should be all cleaned up and we will see the market strengthen on the smaller fruit. The overall quality is good with some spotting and some discoloration due to gassing showing up on some lots primarily in the choice and standards. Expect the quality to continually get better as we decrease our gas hours in the next few weeks.

LETTUCE (GREEN & RED LEAF)

Supplies are close to average this week on both green and red leaf. Quality is good weighing 23-25 lbs. per case with 10-11" heads.

LETTUCE (ICEBERG)

Supplies are average in Yuma this week though strong throughout the industry. Quality is good and weights

are 38-42 lbs. Quality should begin to improve with high temperatures falling during the day. Thirty size lettuce supplies are average.

LETTUCE (ROMAINE)

Normal supplies this week. Quality is very good with expected weights to be 37-39 lbs. per case with 11-12" heads, however, an occasional misshapen head along with some twist can be seen.

LETTUCE (ROMAINE HEARTS)

Average supplies with fairly good quality this week; an occasional insect along with some slightly twisted heads can be seen. With cooler nighttime temperatures, hearts are starting to become more cupped than in the past few weeks and will become more solid in form over the next few weeks.

LIMES (PERSIAN)

Prices are steady this week, but values remain with 110/150s. Lime supply for the next 6-8 weeks will be ample but not excessive. Weather at this time of year is always a factor as frontal passages bring rain that intermittently hinders harvesting. An occasional prolonged storm will cause longer delays. When this happens markets will fluctuate depending on demand at the time. Demand will increase as we move forward to the holidays putting upward pressure on the market until the last days of the year. Considering that supply is not abundant, we could expect some rise in the market over the next three weeks.

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.

ORANGES

Market is steady with good supplies on all sizes we are peaking on 88's-113's followed by 72's, the overall quality is very good as we are starting to see some cooler nights which is helping to bring on some color allowing us to decrease our gassing hours to bring out the color. The fruit is eating excellent and is very strong, internal juice and sugar is very good with minimal acid. This is a great time to promote California navels and we will have good supplies for the months to come barring any major weather issues. Sugar levels range from 12 to 13 Brix.

PARSLEY (CURLY)

Quality is very nice with bunches of 9-11" in length with dark green color.

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PARSLEY (ITALIAN)

Quality and appearance continues to be very nice with 10-12" inches in average length and dark green color.

PEPPER (GREEN BELL)

EAST: Good supplies and quality still available. FOB prices are generally steady.

WEST: Nogales is the major sourcing crossing point. Quality remains good. Supplies continue to increase. FOB prices are generally steady.

PEPPERS (JALAPEÑOS)

EAST: FOB prices are up several dollars. Quality remains good.

WEST: FOB prices down again this week. Quality is good.

PEPPER (RED & YELLOW BELL)

Red and yellow bells will be in tight supply through mid-December, possibly early January.

PINEAPPLES

Rainfall in Central America continues to cause issues with quality and availability. Supplies remain tight. Quality is very good: fruit is firm, sweet, and juicy. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Demand is strong enough to keep supplies moving out, and FOBs are firm on larger size cartons. There has been some weakness on small size cartons and consumer bags as size profiles are heavier to 80ct and smaller. Trucks have loosened up some, but we expect them to tighten back up in the next 7-10 days as Christmas and New Year's ads ramp up.

RED CABBAGE

Volume is not very heavy for the first week of red cabbage in Yuma. Temperatures have been cool and demand has slightly improved this week. Product is large, heavy and dense with great color.

SALADS & BLENDS

Prices are level. Yuma quality is good, but romaine color is deeper green than normal. Light creasing and mechanical damage are minor issues.

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)

Quality from both Yuma and Mexico is excellent. Demand is good. Weights are 20-22 lbs. and bunches are large and full with 9-11" in length. The color is a dark forest green. There is a possibility for lower yields next week with anticipated cooler weather and lettuce ice in the forecast.

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. High FOB prices with pollination issues and only fair quality.

WEST: As with the yellow, supply of green squash is tight but is easing somewhat and we look for it to continue to improve over the next two weeks.

SQUASH (YELLOW)

EAST: Supplies continue to be extremely tight. Quality is fair at best. High winds have caused pollination problems which has decreased yields. Prices will remain high until the MX crop starts with sufficient volume which should be another two weeks.

WEST: A few more supplies are crossing this week which is putting downward pressure on FOB prices.

TOMATOES

EAST

Rounds

Rounds continue to be in short supply. FOB prices are generally steady. We are beginning to see some downward pressure on prices, especially the smaller sizes. Our Immokalee crop has begun with very light volume. It will be another week or two before volume reaches a meaningful level. 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 remains extremely tight in the east but FOB prices have eased somewhat. Prices are still above contract trigger price points. There are still few supplies available from any growing region. The situation of the MX crop has been well documented (weather related).



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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.

Grapes

Supplies of grapes have improved. Look for prices to be down on the 12/1pt. Quality remains good.

Cherries

Supplies remain tight. There being no western supply is putting more demand on this eastern product. FOB prices are generally steady but are seeing downward pressure.

WEST/MEXICO

Rounds

Rains are hitting south CA and the Baja regions. 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 60 days. Many fields had to be replanted and that fruit will not start to be harvested until late December or early January. Quality variable. Vine Ripes and large sizes are practically nonexistent. Strongly pulling from the east to meet demand.

Romas

A few more romas are crossing at Nogales but volume is still extremely low for this time of year. 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 down from last week. Quality is variable but not better than fair.

Grapes

Supply of good quality remains tight but is improving slightly. 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 down slightly.

Cherries

For all practical purposes, there is no supply of cherry tomatoes in the west. Quality continues to be suspect of any western product found. Going east to meet demand.

TREE FRUIT

Black plums are almost finished. Please call. 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. Melons are deep red, firm, juicy, and sweet. Sugar levels are high, ranging from 12 to 14 Brix.