

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending December 19, 2014

## MARKET OVERVIEW

Though drought conditions still persist, California finally received some much needed rain last week and more is expected into the weekend. 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. Trucks are in adequate supply in most growing regions. The Christmas tree season dominates the transportation picture in the Northwest however, where trucks are in tight supply for potato, onion and apple shipments.

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, Cucumbers	Moderate	Good	↑
Iceberg Lettuce	Moderate	Excellent	↓
Romaine Lettuce & Hearts	Moderate	Good	↓
Green Beans	High	Good	↓
Cauliflower	High to Extreme	Fair to Good	↔
Green Bell Peppers	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	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, Bartlett Pears, Red Anjou	Moderate	Good	↔
Fujis, Braeburns, Cameos	High	Good	↔
D'Anjou	High	Fair	↔



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## APPLES & PEARS

The Washington market is steady at low levels. Storage stocks are ample. The crop is dominated by 64- to 88-count fruit; small sizes are tight. Sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). Supplies are sweet, crunchy, and juicy. The pear market is unchanged; storage supplies are plentiful. The Bartlett season will continue through January. Quality is excellent: fruit is crisp and sweet, yet slightly spicy. Sugar levels range from 12 to 14 Brix.

## 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

Expect elevated prices through the month. Although Mexican volume is high, Peruvian stocks will be limited for the next three months. Flavor is grassy, texture is crisp, and stalks are straight.

## AVOCADOS

The market is steady; expect plentiful stocks through the Super Bowl in early February. Quality is very good: oil content is high, creating creamy texture and nutty flavor.

## BLACKBERRIES

Cool weather has slowed harvesting in Mexico; supplies are tightening, but prices are holding steady. Quality is very good: fruit is firm and juicy. Flavor is sweet; sugar levels range from 12 to 13 Brix.

## BLUEBERRIES

Prices are up. The Argentine season has ended and Chilean shipments are sporadic. Cooler than normal temperatures have slowed growth in California and Mexico. Fruit is deeply colored, plump, and sweet; sugar levels range from 14 to 18 Brix.

## BOK CHOY

Tight supplies, high prices.

## BROCCOLI

The market is expected to remain near the bottom through December. Quality is best in Arizona and Mexico (into Texas): heads are dark green and crisp, but bracketing and pin rot are minor issues.

## CANTALOUPE

Market very tight demand exceeds supply especially on the west coast as we are finished on domestic product and getting a few out of Mexico crossing and little to none from the offshore fruit which will not start with any big volume until the first of the year, melons will remain very tight through the first of the year. The overall quality is fair with some rough netting and green cast. Sugar levels measure 9 to 10 Brix.

## 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

Prices are up. Arizona stocks are starting to increase, but overall volume is low. ESS Cauliflower is now available in the 12-count size.

## CELERY

The market remains elevated due to strong holiday demand. Supplies are forecast to increase later this month. Despite recent rains, quality is excellent: texture is crunchy and flavor is peppery.

## CILANTRO

Supplies remain plentiful this week 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 tight. FOB prices up slightly. Quality is variable. Off-shore cukes should start to arrive toward the end of this week.

**WEST:** Supplies and FOB prices are generally steady. We look for more supplies to become available around Christmas.

## EGGPLANT

**EAST:** More supplies available causing lower FOB prices. Quality is good.

## 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.





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## **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 finishing 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. There is a few Peruvian greens and reds on the west and East coast with very nice quality and high prices.

## **GREEN BEANS**

Production is increasing in Mexico and availability is steady in Florida. Quality is good in the East and West.

## **GREEN CABBAGE**

Supplies are ample this week. The sizing is great and nearing 55-60 lbs. in each carton. The market is expected to remain steady.

## **GREEN ONIONS**

Green onions have decreased in pricing since Thanksgiving. Pencils are priced low, while mediums and extra larges are moderately priced. The holiday pull begins next week, and there may be a shortage of crews in Mexico. Prices are expected to increase starting next week.

## **HONEYDEW**

Market very strong as Mexico is the only product crossing on the west coast a very few offshore showing up on the East Coast, the market will continue to stay very strong through the first of the year. The overall quality is fair to good with mostly clean cream to green cast. The internal color is very good with descent sugar levels. 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 Chilean fruit around but within the next week 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 (GREENLEAF/VARIETY)**

Prices are low and volume is high. Quality is excellent.

## **LETTUCE (ICEBERG)**

Weak demand and plentiful supplies are keeping prices low. Quality is very good: minor problems include epidermal blistering and peeling, cracking, and weak tips.

## **LETTUCE (ROMAINE)**

Ample supplies are keeping prices low. Quality is very good, but growers are peeling outer, damaged leaves due to mildew and seeders; this is causing low carton weights in some lots.

## **LETTUCE (ROMAINE HEARTS)**

Supplies are above average due to warm weather, and demand continues to be very good. The rapid growth has caused some irregular head sizing with an occasional twisted head. Weights on a three count bag range between 24-26 oz. with lengths of 11-12."



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## LIMES

Expect high prices through the winter due to lighter-than-normal plantings and strong holiday demand. Quality is very good: fruit is tart and juicy.

## ONIONS

The market is low; volume is high. Stocks from the Pacific Northwest region are crunchy, well formed, and have bold flavor. Trucks are extremely tight.

## 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. Sugar levels range from 12 to 13 Brix.

## PARSLEY (CURLY)

Supplies are slightly down from last week mainly due to Salinas Valley harvesting ending. Quality is very nice with bunches of 8-10" in length with dark green color.

## PARSLEY (ITALIAN)

Supplies are slightly down from last week mainly due to Salinas Valley harvesting ending. Quality is very nice with bunches of 9-11" in length with dark green color.

## PEPPER (GREEN BELL)

**EAST:** Demand very strong. Market active. Rain has caused a delay in harvesting. Not much movement in FOB prices but there is some upward pressure especially on the choice grade.

**WEST:** Nogales is the major sourcing crossing point. Quality remains good. Supplies continue to increase. FOB prices are up several dollars on all grades and sizes.

## PEPPER (JALAPEÑOS)

**EAST:** Little demand is causing FOB prices to be weaker this week. Quality remains good.

**WEST:** FOB prices generally steady this week. Quality is good. Texas FOB prices lower as the crop transition is complete.

## PEPPER (RED AND YELLOW)

The market will remain elevated until Mexican production increases in January. Quality is excellent: shape is blocky, walls are thick, and flavor is sweet, yet peppery.

## PINEAPPLE

Prices are steady to slightly higher than last week; holiday demand will drive up the market. Quality is very good: fruit is firm, sweet, and juicy. Sugar levels range from 13 to 14 Brix.

## POTATOES (IDAHO)

Idaho and Washington prices are elevated. Large stocks (40- to 70-count potatoes) remain tight; supplies are dominated by small sizes. Trucks are extremely tight out of NW.

## RASPBERRIES

The market is unchanged. Rain in Southern California and cold temperatures in Central Mexico have slowed production a bit. Domestic quality is best: berries are sweet with slight floral notes.

## RED CABBAGE

Supplies are improving with plenty to cover demand. The quality has been very good with great color, sizing and condition. The market remains high.

## SALADS & BLENDS

The market is stable. Yuma quality is good; color is improving. Light creasing and mechanical damage are slight problems. 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)

Volume is approximately 20% below average, harvesting only out of Yuma this week. Quality is excellent with weights of 20-22 lbs. Bunches are large and full with 9-11" in length. Demand is fair, and prices are varying depending on growing and shipping areas.

## SPRING MIX

Prices are low; stocks are abundant. Quality is excellent: texture is delicately crisp.





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## SQUASH (GREEN)

**EAST:** Same story as with the yellow squash. High FOB prices with pollination issues and only fair quality. Cool weather will slow growth. FOB prices generally steady. Large zucchini extremely short.

**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. Cool weather is expected this week which will slow growth. Prices will remain high until the MX crop starts with sufficient volume which should be another week or two.

**WEST:** A few more supplies are crossing this week. FOB prices are generally steady with downward pressures.

## STRAWBERRIES

Prices are high. California's strawberry growing regions (Coachella, Oxnard, and Santa Maria) received heavy rains last week. Growers are cleaning up fields while trying to pack ahead of another storm that is forecast for the end of the week. Industry-wide problems will continue due to these back-to-back storms; quality problems include bruising, mold, small size, and soft texture. Berries from Florida and Mexico (into Texas) are on the market and can be used as substitutes.

## TOMATOES

### EAST

#### Rounds

Rounds continue to be in short supply. FOB prices are generally steady within a narrow range. We look for smaller sizes to become more plentiful so that price should start to drop after next week. FOB prices of other sizes should also begin to drop after next week but possibly at a smaller rate. Our Immokalee crop continues 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 tight in the east but FOB prices have eased again this week as a few more supplies come on-line. We forecast more supplies in the next several weeks which will continue to put downward pressure on FOB prices. We have previously reported that fewer acres

are being planted in romas in Florida due to the Mexican market.

#### Grapes

Supplies of grapes continue to improve. FOB prices to be down again this week on the 12/1pt. Quality remains good.

#### Cherries

Supplies remain tight but continue to improve. Demand continues to be good as the west continues to have to look to Florida to meet their needs. FOB prices are down due to the increase in supplies.

## WEST/MEXICO

### Rounds

Mature green supplies are still not available in the west. Vine ripe volume remains low for this time of year due to the hurricanes and tropical storms that went through the growing regions over the past 60-70 days. Many fields had to be replanted and that fruit will not start to be harvested until late December or early January. Quality variable. Strongly pulling from the east to meet demand.

#### Romas

More romas are crossing at Nogales but not yet near normal levels 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 again this week. Quality is variable.

#### Grapes

Supplies continue to improve. Crossings from Baja, McAllen and Nogales. Fruit is running large. FOB continues to drop and we look for prices to continue to fall.

#### Cherries

Supplies in the west continue to be extremely tight. Quality continues to be suspect of any western product found. Going east to meet demand.

## TREE FRUIT

Black plums are almost finished. There are good supplies on persimmons, pomegranates and Asian pears.

## WATERMELON

Prices are expected to remain elevated for at least two to three more weeks when the offshore season (from Guatemala into California and Florida) begins. Stocks remain scarce in Mexico (into Nogales and South Texas). Quality is average: melons are deep red, firm, juicy, and sweet. Sugar levels are high, ranging from 12 to 14 Brix.