

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending January 23, 2015

MARKET OVERVIEW

Supplies of most fruits and vegetables continue to be on the short side due to the recent freeze, and prices continue to rise. Lettuce items in particular are extremely tight, and prices have reached extreme levels. Unfortunately, we are not seeing a reduction in freight cost. Trucks and drivers are in a demand-exceeds-supply situation. Truck companies have to abide by new laws that mandate their drivers to get a 34 hour restart rule. Their time on the road is cut back and although this enforces safer driving, it does take longer to get from one side of the country to the other.

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



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APPLES & PEARS

Demand and movement is steady. Supplies continue to be short on all small fruit in all varieties. Red delicious offers great promotional opportunities on 88s and larger. Quality remains excellent. Sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). 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. Sugar levels are elevated, ranging from 12 to 14 Brix.

ARTICHOKES

Light supplies continue this week and next week. The chokes are now lightly frosted due to cold morning temperatures and will now have a nuttier flavor to them. There are very few large chokes, most are 30s and 36s. Prices are slightly higher.

ARUGULA

Supplies of regular Arugula are very light and quality is fair. Expect some yellowing and frost damage. Supplies of wild arugula are also very light with some yellowing and frost damage.

ASPARAGUS

Asparagus production continues to increase in Peru, and quality is good. Demand is on the rise from the West; pulling from Peru to meet demand, alongside of having labor issues that are causing delays in unloading. Expect to see an increase of price at the LA port. Mexico production has been dealing with weather related issues for the last month and freezing temperatures that stopped majority of production. The forecast seems to look better next week and we are hoping to see production out of Mexico ramp up in the next week or so.

AVOCADOS

Avocados (48s) continue to be the tight item this week with many switching to 40s for coverage. Prices should remain strong through Super Bowl. Available supplies are limited of new crop. There have been no reports as to any damage from recent cold snap in California growing areas.

BLACKBERRIES

Prices are unchanged; favorable weather has increased production in Mexico. Quality is very good: fruit is deeply colored, plump, and sweet. Sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Expect an elevated market through mid-January; offshore shipments remain sporadic. Berries are firm and sweet; sugar levels range from 14 to 18 Brix.

BOK CHOY

Tight supplies, high prices.

BROCCOLI

The broccoli market remains very active as supplies are scarce. Although temperatures have increased slightly, the change is not drastic enough to really make a difference in broccoli. Ground temperatures remain very cool, and growth is still slow. The industry will remain extremely tight for at least another week.

CANTALOUPE

The market is expected to remain elevated for a few more weeks. Offshore volume is low on both coasts, but it will rise when growers move to Honduras this month.

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

Lighter supplies than demand for this week. There will be good supplies at the front part of the week and then lighter harvest towards the end of the week. A majority of 9s and 12s will be available each day, but limited on 16s. Quality remains strong and there will be available product throughout the week.

CELERY

Supplies are somewhat below average this week due to the recent freeze which caused some blister and peel. Demand is fair. Weights are between 54-55 lbs. with strong green color.

CILANTRO

Light supplies this week. Quality is nice with bunches averaging 9- 11" in length showing good green color with occasional purple cast. Prices continue to trend upward.

CUCUMBERS

EAST: A very active market with much stronger FOB pricing for both FL and off-shore product. Fortunately,



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demand is also rather weak. Quality is variable.

WEST: Supplies crossing at Nogales but with lighter volume due to the cold weather causing higher FOB prices. Demand is light and will be the determining factor on where the market goes for the rest of the week. Quality is fair.

EGGPLANT

EAST: Good supplies available. Quality is good. FOB prices are steady.

WEST: Good supplies and good demand. FOB prices up slightly. Quality is good.

FENNEL/ANISE

Fennel supplies this week are projected to be slightly above demand for the week. Percentages of larger sizes will be close to what is needed for contracts. Demand should remain decent, but there should be product available on a daily basis throughout the week.

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.

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 and very high prices.

GRAPEFRUIT

Very limited availability continues in California, with good supplies available in both Texas and Florida.

GRAPES

Green seedless are very, very 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. Imports should arrive in the East coast by mid-month.

GREEN BEANS

Good availability in the East and West.

GREEN CABBAGE

Supplies are average this week. Sizing and weights will

be smaller until the end of the month with carton weights of 45 lbs. and small to medium head size. Cold weather in the Midwest and south central U.S. has increased demand for Yuma cabbage.

GREEN ONIONS

Light supplies continue though becoming more available. Quality remains nice with medium sized onions as the majority with higher prices followed by pencils, somewhat less in price.

HONEYDEW

The market remains elevated; offshore stocks will be tight for a couple more weeks. Sugar levels range from 10 to 11 Brix.

KALE (GREEN)

Plentiful supplies continue. Overall quality and appearance continues to be excellent. Bunches are averaging 14-16" in length with good 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 moving well once again. However, small fruit is tight. 165s are becoming tight as people have to move up a size to get covered. Prices are mirroring the change in availability. There are currently good supplies of 95s and 115s. Fruit is coming out of all growing areas.

LETTUCE (GREEN AND RED LEAF)

Supplies will be extremely short this week and next on mix leaf. Quality is mediocre overall as green and red leaf have 4-5 leaves with blister and occasional dry mildew on the outer leaves. Each case will be 20-22 lbs. and 9-10" per head.

LETTUCE (ICEBERG)

Extremely light supplies are forecasted this week. Weather is expected to be slightly warmer this week which could help increase supplies, size and weights. Weights are in the mid to high 30s. All lettuce is now showing epidermal peel. Prices continue to increase.

LETTUCE (ROMAINE)

Supplies will be extremely short all week and next on romaine, and demand is strong. Quality is fair as more



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issues from frost are evident; blister and occasional dry mildew on the outer leaves. Each carton is expected to be 33-35 lbs. with 10-11" long heads.

LETTUCE (ROMAINE HEARTS)

Supplies will be well below average this week, and demand is very strong. Expect a shortage of supplies for the next 4-6 weeks. The overall quality will be fair. Product is showing blisters and mildew due to the recent severe frost. Expect the blister to exist for the next 7-10 days, barring any new frost occurrences.

LIMES (PERSIAN)

Prices have increased this week, up \$10 on some. Lime supply for the next 5-6 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.

NAPA

Limited supplies, high prices.

ONIONS

There are no real changes this week. Deals can be made on large purchases. Growers are becoming very concerned to sell because the Mexican crop is only one month away from crossing. Fobs may fall further.

ORANGES

Prices are unchanged. California Navel growers took precautions to protect fruit against last week's freezing temperatures. Stocks are also available in Florida and Texas. Flavor is sweet: sugar levels range from 12 to 13 Brix.

PARSLEY (CURLY)

Supplies are very good this week. Crops are unaffected by the recent freeze. Quality is nice with bunches of 8-10" in length with dark green color.

PARSLEY (ITALIAN)

Supplies remain light this week but with temperatures expecting to warm, better numbers are expected next week. Overall quality is very nice with bunches of 9 -11" in length with dark green color.

PEPPER (GREEN BELL)

EAST: Demand is light. FOB prices generally steady. Tans are tight. Quality is very good.

WEST: Nogales is the major sourcing crossing point. Quality remains good. Demand is weak. Supplies are

plentiful. FOB prices are weaker.

PEPPER (JALAPEÑOS)

EAST: Supplies good. FOB prices steady with upward pressure. Quality remains good.

WEST: More supplies causing FOB price to fall slightly. Good quality.

PEPPER (RED AND YELLOW BELL)

The market is easing; Mexican supplies are plentiful. Quality is excellent: shape is blocky, skins are smooth, and flavor is sweet, yet zesty.

PINEAPPLE

High prices are forecast through January. Large-size fruit is limited in Costa Rica due to cold weather and normal crop rotation; small supplies are more widely available. Quality is good: fruit is firm, sweet, and juicy. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

Pricing is firm and will move up slightly on the largest sizes (40ct through 70ct) due to greater demand and lower availability. Smaller sizes are much more plentiful, and the demand is lower.

RASPBERRIES

The market is steady at high levels. Planned varietal shifts have contributed to higher quality, but lower yields. California quality is very good: sugar levels range from 8 to 10 Brix.

RED CABBAGE

Supplies are steady. Additional demand from other supply areas has kept the market higher. This trend should continue until weather warms up. Color and condition has been nice with overall smaller sizing.

SALADS & BLENDS

Epidermal blistering and peeling will be industry-wide problems in iceberg and romaine all month.

SNOW AND SUGAR SNAP PEAS

Snow peas and sugar snaps are in tight supply (Peru, Mexico, and California). Prices remain in the highs for both. Quality is poor, and limited availability will continue through next week.

SPINACH (BABY)

Baby spinach supplies are light. Quality is fair due to frost damage.



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SPINACH (BUNCHEd)

Freezing weather has slowed down spinach growth resulting in lower numbers. Demand is strong as well as the market. Overall quality is good, however weights are a bit lighter due to some dehydration from the freeze (20-22 lbs.). Color is dark green, and bunches are 9-11" in length.

SPRING MIX

Spring Mix supplies are light and availability is limited. Product is showing quality issues of yellowing and wetness due to rain and possible freeze damage. Price is up.

SQUASH (GREEN)

EAST: Quality is variable but is better than the yellow. FOB prices are up moderately.

WEST: Cool weather has slowed supplies putting strong upward pressure on FOB prices. Quality is variable.

SQUASH (YELLOW)

EAST: Supplies are tighter this week causing FOB prices to be stronger. Quality is extremely variable.

WEST: Supplies continue to cross at Nogales this week. The northern fields did experience damage from freezing temperatures last week and has caused supplies to be tighter. FOB prices are stronger and quality is variable.

STRAWBERRIES

California prices are stable. Cold weather slowed production in the Coachella and Oxnard regions, decreasing volume. Warm weather is forecast; plant growth should rebound soon. Stocks are sufficient in Florida and Mexico (into South Texas). Sugar levels are high, ranging from 14 to 15 Brix.

TOMATOES

EAST

Rounds

The supply of 5x6s continue to improve causing the FOB pricing to fall from last week. 6x6 supply is also stronger causing those prices to also fall but not as much. 6x7 supplies are slightly tighter causing that market to be up slightly. Overall demand is relatively weak. Quality is very good.

Romas

Demand continues strong and supplies are relatively steady causing little change in FOB prices from last week. Quality is very good.

Grapes

Supplies of grapes continue to improve and the market is down again this week. Quality is very good.

Cherries

Supply and demand remain relatively in balance. FOB prices are down slightly from last week. Quality is good.

WEST/MEXICO

Rounds

Much better volume is crossing at Nogales. Demand is relatively weak. FOB prices at or near suspension agreement minimums. Quality is variable but good quality can be found.

Romas

Demand strong but supplies have improved causing weaker FOB prices. Nogales and McAllen are the major crossing points. Quality is generally good.

Grapes

Supplies and demand good. Mexican supplies now crossing at Nogales. FOB prices generally steady and continue to be at low levels. Quality is good.

Cherries

Supplies in the west are increasing. Quality is variable. FOB prices at or near minimums.

TREE FRUIT

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

WATERMELON

The market is elevated. Mexican supplies remain scarce, but limited quantities of offshore fruit are starting to arrive on the East Coast. Quality is average: melons are deep red, firm, juicy, and sweet. Sugar levels are high, ranging from 12 to 14 Brix.