

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending March 20, 2015



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



FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending March 20, 2015

MARKET OVERVIEW

Cauliflower supplies are incredibly tight and there is no relief on the horizon. Desert supplies are waning in the twilight of the winter season while the north, Salinas and Santa Maria, are gapping after a premature start. Cauliflower prices are in excess of \$30 FOB. Bunch broccoli supplies are tight while Asian broccoli crowns are practically nonexistent. The broccoli scenario will worsen further over the next 2-3 weeks. These markets will not resemble any degrees of normalcy until the Salinas season is firmly established in early to mid-April. The iceberg lettuce and romaine markets are in a temporary holding pattern. Lighter supplies are looming as the desert season approaches its conclusion in late March. The first Huron lettuce shippers will start next week. The majority of iceberg lettuce shippers will remain in Yuma and move directly to Salinas in early to mid-April. Cooler weather in Florida and a seasonal decline have reduced yields in Florida on rounds, romas and grape tomatoes.

APPLES AND PEARS

Great promotional opportunities remain on 88s and larger red delicious, 72 larger on fujis, goldens, cameos, pink ladies and braeburns, and demand is steady. Small red delicious are easy to obtain, but shortages continue on other varieties. Quality remains exceptional. Pears (especially 110x and smaller) continue to exceed supply. Supplies are tight, mostly on fancy grade, and crop is running heavy to U.S. #1, peaking 90s and larger.

ARTICHOKES

Steady supplies are forecasted this week and for the coming weeks. The chokes are frost free with excellent quality. Sizing is estimated to be heavy to 12s, 18s, and 24s. Prices should be steady to higher this week.

ARUGULA

Supplies of regular arugula are good. Expect some yellowing and frost damage. Supplies of wild arugula are also stabilizing with some yellowing and frost damage.

ASPARAGUS

Supplies from both Mexico and Peru are available with excellent volume, mostly on STD. Limited volume of JMB/LGE is available and will continue this way for the next few weeks.

AVOCADOS

Mexican supplies are up from last week and prices are down as more product has crossed this week than in the previous few weeks. However, we are still seeing lighter supplies. Quality is good.

BANANAS

In Central America, last December brought cooler than normal weather patterns, rain and less solar radiation negatively impacting the growing conditions and yield of bananas in Costa Rica. In addition, in the month of January, the Atlantic region suffered extreme high winds in the growing region. Our growers lost thousands of banana plants. Guatemala suffered two extreme cold fronts, causing a significant loss in product.

BLACKBERRIES

The market has eased slightly; supplies are expected to increase by Easter. Quality is good: growers are working diligently to remove rain damaged fruit. Sugar levels range from 12 to 13 Brix.

BLUEBERRIES

Prices have stabilized. The Chilean season is ending; stocks are limited. Supplies from Baja, Mexico will increase later in the month; the California and Florida seasons will begin at that time as well. Quality is good: fruit is plump, sweet, and juicy. Sugar levels range from 14 to 18 Brix.

BOK CHOY

Tight supplies, high prices.

BROCCOLI

With the cooler weather over the past couple of weeks in Salinas, there are few supplies available. As the fields appear right now, this shortage in supply could continue



FRESH DIRECTIONS



into next week. The industry has not really reacted with higher prices yet, as there is still very little demand for product, but expected to increase as March continues.

CANTALOUPE

Market very strong and tight on both coasts, but will start to ease up by middle to end of next week as we see more product arriving from Guatemala and then the following weeks more volume arriving from Honduras. The overall quality is very good on the Honduras fruit with nice clean net and a mostly green to straw cast and excellent internal color and sugar. We should see the market keep steady until around the middle of April and probably strengthen until we start California and Arizona around the first week of May. Sugar levels are elevated, ranging from 13 to 14 Brix.

CARROTS

Availability has improved for jumbo carrots in California. Quality is good.

CAULIFLOWER

Harvesting is solely out of Salinas this week with well below average supplies. Demand is good. A majority of 12s and 16s will be harvested each day, and quality remains strong overall. Yuma cauliflower is finishing this week. Prices have advanced and quality is fairly good; slightly smaller and lighter weights of 26-28 lbs.

CELERY

Celery supplies for this week are anticipated to be steady. Majority of size is on 24 count. Quality is very nice in both Yuma and Oxnard with weights of 58-60 lbs. with large meaty shanks and dark green color. Demand is very light. Anticipate slightly lower prices as volume increases over the next week.

CILANTRO

Supplies are down slightly again from last week. Quality and appearance are fairly nice. Bunches are averaging 9-11" in length and showing good green color.

CUCUMBERS

EAST: Vast majority of supplies still coming from Honduras but the volume continues to wind down. In fact, one major grower has already finished harvesting for the season. Our Florida spring crop is still about three weeks away. Quality is good but becoming more variable. We may see a gap situation toward the end of this month or the first of April.

WEST: Nogales crossings continue. Good supplies with

slow demand. FOB prices are weaker again this week. Quality is variable.

EGGPLANT

EAST: Eggs are currently in very short supply. FOB prices generally steady with some upward pressure.

WEST: Supplies are slightly better. FOB prices generally steady with some downward pressure. Quality is good.

FENNEL/ANISE

Fennel supplies this week are projected to be almost double for the week. Salinas started this week.

GARLIC

The garlic market has improved, although we are still facing issues with getting product from China. We are still seeing some Chinese pounds that have become available in the market. Although pricing still remains high, it has come down from where it was. It is anyone's guess whether more pounds will continue to become available or if "the pipeline" will run dry again. Time will tell. On the domestic side, the demand continues to remain high/moderate, and supplies are still tight. However, we are seeing it ease up.

GINGER

There is a supply and demand situation that happens from time to time with ginger. The crop in storage remains tight. This is causing a lack of supply and very high prices, although they are not as high as they were several months ago.

GRAPES

Market is split on reds as we are seeing the end of the Chilean flames and will see more crimsons and other red varieties through April until we start California and Mexico fruit around the first week of May. The flames that are still here and a few more arriving should be cleaned up within the next 2 weeks, there is a wide range in quality and you will see a wide range in prices. The greens are fairly steady other than some amber fruit that will be priced much lower than clean green fruit. The overall quality is good with fruit eating very good and sugar content excellent.

GREEN BEANS

Availability is plentiful in Nogales, generally steady in FL.

GREEN CABBAGE

Quality and supplies are great this week with expected weights of over 50 lbs. and medium/large head size. Plenty of supplies are expected for the next 2 weeks.



FRESH DIRECTIONS



GREEN ONIONS

Green onions have been a struggle on both lower than normal volumes and getting them crossed over the border. For the short term there seems to be no changes. The market will remain volatile for next week. Steady prices with lighter volumes.

HONEYDEW

Market is steady as we are seeing offshore fruit as well as Mexican honeydews on the market. The overall quality is very good with excellent green to cream cast and great internal color and sugar. Expect the market to keep steady and possibly ease a bit as we see more off shore arrivals over the next few weeks. Quality is very good: sugar levels range from 11 to 13 Brix.

KALE (GREEN)

Plentiful supplies continue. Overall quality and appearance continues to be superb. Bunches are averaging 9-11" in length with dark green color.

KIWI

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

LEMONS

Market is steady as we are packing dist. 1 and dist. 2 fruit, with heavier volume being dist. 1 and overall quality looks good with excellent color and very good shape and juice content. We have finished our dist. 3 fruit which was starting to get tired and quality was fairly rough. We will be packing our dist. 1 fruit through May and then the dist. 2 fruit will take us through the summer months. We have normal volume crops out of both districts, just hoping maturity out of dist.2 holds strong and we do not run into the supply issues we have faced the past 2 years in the months of July and August. Currently mid-range and small sizes are running a little tighter with 140's being fairly tight as district 1 fruit seems to be mostly 115's and larger and fruit from district 2 packing out mostly 165's and smaller.

GREEN AND RED LEAF LETTUCE

Supplies are tightening up. Depending on weather, some Salinas harvest may start by next week. Quality is good overall with some light but occasional mildew on a few leaves. Both green and red leaf are 24-26 lbs. per case while each head is 10-11" long.

ICEBERG LETTUCE

Lighter supplies are forecasted for this week. Quality issues include mildew, Sclerotinia and insect damage, but color and texture are good with average head size. Weights are 40-42 lbs. which is about normal. A few 30's will be packed daily. Prices should be steady to higher this week. We are heading into transition and there appears to be a gap in production from the desert to the northern growing region, please be aware that product may become less available.

ROMAINE

Supplies will be just above average this week. Demand is good. Quality is good overall with just some light but occasional mildew and fringe burn on some heads; effects of tough winter weather. Insect pressure is being kept at a minimum, but there may be some at the bottom of the leaves. The carton is 38-39 lbs. while each head is 11-12" long.

ROMAINE HEARTS

Supplies will be about average this week; last two weeks of harvest in the Yuma area. Harvest in the Salinas area should begin this week. Overall quality is good along with demand.

LIMES (PERSIAN)

The market will increase until the spring harvest begins in April. Small sizes are especially scarce. Quality is very good.

NAPA

Limited supplies, high prices.

ONIONS

For the very first time since September 2014 (the beginning of the Idaho onion season) we are seeing FOB increase on most sizes and varieties. As stated last week not all shipper possess cold storage and with the warm winter out west we are seeing different levels of quality in the market place. Shippers without the cold storage are looking to finish the season, that coupled with poor quality out of Washington has resulted in an FOB increase.

ORANGES

Market has steadied as ports have opened back up and export movement has picked back up. There is good volume left to harvest and we have started to pick our gibbed fruit (stronger late fruit) you will see a tinge of green around the stem and bloom end on some blocks as the gib helps to slow maturity of the fruit so we have strong mature fruit for later in the season. Volumes of



FRESH DIRECTIONS



smaller sized navels seem to be becoming a little lighter as the crop is sizing up, with peak sizes now being 72's / 56's then 88's. The overall eating quality is excellent and internal condition is excellent. We will be harvesting navels through May and possibly longer depending on weather and demand. We will start a few Valencia's around the middle part of April which will take us through the summer months.

PARSLEY (CURLY)

Supplies are plentiful this week. Quality is very nice with bunches of 8-10" in length with dark green color.

PARSLEY (ITALIAN)

Supplies continue to improve. Overall quality is very nice with bunches averaging 9-11" in length.

PEPPER (GREEN BELL)

EAST: Supplies have increased causing for a weaker market. FOB prices are down. Quality continues to be good but we are concerned what the recent weather will have on shelf-life.

WEST: Nogales is the major sourcing crossing point. Low demand and better supplies this week is cause for lower FOB prices.

PEPPER (JALAPEÑOS)

EAST: Supplies remain tight with FOB prices generally steady. Quality is good.

PEPPER (RED AND YELLOW)

Although prices are level, Mexican production is in its seasonal decline. Quality is very good, but softness is a minor issue due to recent rain.

PINEAPPLE

The market is steady at high levels; expect limited stocks until approximately mid-April. A wide range of quality is being reported: bruising is a minor problem. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

The market has strengthen over the past week on large potatoes. This increase applies to both varieties which continues to support the large potato shortage that has plagued Idaho this season. Increased FOBs are a result of increased demand throughout the state.

RASPBERRIES

Prices are inching down; supplies should be sufficient for the Easter holiday. Quality is very good: berries are firm and sweet.

RED CABBAGE

Light supplies can be expected for the next few weeks as supplies are being stretched between planted acres and demand.

SALADS & BLENDS

Prices are stable; iceberg and romaine stocks are abundant. Warm temperatures throughout the desert region may lead to dense lettuce, internal burn, growth cracking, and rib blight in raw product supplies over the next week or two.

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)

There are good supplies of baby spinach and clipped spinach. Quality is fair due to frost damage.

SPINACH (BUNCHED)

Numbers are good with excellent quality this week. Bunches are large and full in length and weights 21-23 lbs. Demand is good and pricing steady.

SPRING MIX

Spring mix supplies are very good. Product is showing quality issues of yellowing and possible freeze damage.

SQUASH (GREEN)

EAST: FOB prices are up this week to the same levels as yellow squash. Quality is better than the yellow squash but the weather has had its affects

WEST: Supplies are generally steady from last week but are still down due to field disease pressure. FOB prices stable with some downward pressure on mediums. Quality continues to be variable.

SQUASH (YELLOW)

EAST: Supplies are extremely tight due to the recent weather and quality is fair at best due to scarring and very short shelf-life due to decay. FOB prices are up this week.

WEST: Supplies continue to cross at Nogales this week. Rains have affected the volume available. Few fancies are available. FOB prices are general steady. Quality is variable. We are about 3 weeks away from new crops in new fields.



FRESH DIRECTIONS



STRAWBERRIES

The California market is stable; stocks are ample. Last week's rain-damaged fruit has been removed. Quality is best in California: texture is fairly firm and flavor is sweet. Supplies are diminishing in Florida and Mexico.

TOMATOES

EAST

Rounds

Slow national demand and a weak Mexican market are putting downward pressure on Eastern round tomatoes. The recent cold snap and rains have not dramatically affected quality. However, often times these conditions will shorten the shelf-life of product. We have not heard any reports of a shortened shelf-life product situation as of yet but will let you know if reports began to come in. FOB prices are down on all sizes.

Romas

Supplies continue to be tight this week but demand remains weak. Prices are down on all sizes. Quality is good. Weather may have an effect on quality in the future.

Grapes

Supplies have increased this week and FOB prices are down from last week. Quality is very good.

Cherries

Supplies have increased slightly and demand is weak. FOB prices down. Quality is very good.

WEST/MEXICO

Rounds

The growing regions continue to receive some rain which is very uncommon for this time of year. Light rain occurred today and more is forecasted for tomorrow. Demand has decreased which has caused FOB prices of greens and vine-ripes to be down compared to last week. Quality has become variable due to some skin checking due to the rains but is still generally good.

Romas

Supplies have increased from last week. Nogales and McAllen are the major crossing points. As predicted last week, FOB prices have generally fallen back to Suspension Agreement minimums. Quality is generally good to very good.

Grapes

Supplies are steady but demand has fallen off. Mexican supplies mostly crossing at Nogales. A few are beginning to cross at Baja. FOB prices are down from last week. Quality is variable.

Cherries

FOB prices are steady with downward pressure. Quality continues to be variable due to splits and color.

TREE FRUIT

The market for nectarines and red plums is steady; stocks are adequate. Peaches and black plums are tight; the Chilean season is ending. Quality is good, but light bruising and soft spots are slight issues.

WATERMELON

Prices are up; supplies will be limited for another week or two. Quality is mixed: sugar levels range from 10 to 12 Brix.