

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending March 27, 2015

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	Moderate	Good	↔
Blackberries, Raspberries, Blueberries	Moderate	Good	↔
Strawberries	Low	Good	↔
Grapefruit, Pineapples, Lemons, Oranges, Navels	Moderate	Good	↔
Limes	High	Excellent	↑
Green & Red Leaf Lettuces	Low to Moderate	Good	↔
Green Bell Peppers	Moderate	Good	↔
Red Bell Peppers	Moderate	Good	↑
Iceberg, Romaine Lettuce	Moderate	Good	↔
Romaine Hearts	Moderate	Excellent	↔
Cucumbers	Moderate	Fair to Good	↑
Green Beans	High	Good	↑
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, Baby Spinach	Moderate	Good	↑
Cauliflower	High	Good	↑
Green Onions	Moderate	Good	↓
Green Cabbage	Moderate	Excellent	↔
Red Cabbage	High	Excellent	↔
Broccoli	Extreme	Good	↔
Celery	Low	Excellent	↔
Arugula, Frisee, Fennel/Anise, Mache	Moderate	Good	↔
Bunched Spinach	High	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, Plum, Grape Tomatoes	Moderate	Good	↔
Roma Tomatoes	Extreme	Poor	↔
Red & Golden Delicious, Granny Smiths, Galas, Fujis, Braeburns, Cameos, Bartlett Pears, Red Anjous	Moderate	Good	↔
D'Anjous	High	Good	↔



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## MARKET OVERVIEW

The wet veg markets are beginning to see some volatility as the Yuma season continues to wind down. Cauliflower has been the only commodity to experience a significant gap in supply, but it is possible for others to follow suit as the weeks progress. Many Yuma commodities have seen a slight increase in pricing on the open markets, and this trend will continue until the transition is complete in mid-April. The tomato market still remains high, though it has experienced a little relief this week in Florida with slightly increased volume. This has brought down the market as a whole, since Mexico has to bring down prices to stay competitive with Florida. Conditions should remain this way until national demand picks up. Along with the tomato market, squash is on the rise due to poor growing conditions in Mexico and Florida. Looking forward, we can expect to see a rollercoaster effect in the wet veg market for the next couple weeks as this transition is underway.

## 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. Quality is excellent: sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). 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

Limited stocks and strong Easter demand are pushing up prices. The California season has started, but will not reach volume levels until mid-April. Quality is excellent: flavor is grassy, texture is firm, and stalks are straight.

## AVOCADOS

Mexican supplies are steady from last week and prices are down as a steady amount of product has crossed this week. Supplies continue to increase out of California, so most prices are down a little bit this week. #2 larger sizes (48s and 60s) are higher due to short supply.

## 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

Prices are climbing due to heavy rain throughout the main growing region in Central Mexico; good quality fruit is limited. Expect tight supplies for the next week. Quality is expected to improve; stocks will increase to meet Easter demand. Sugar levels range from 12 to 13 Brix.

## BLUEBERRIES

The market is stable to slightly higher than last week. Berries from Central Mexico are tight due to poor weather. The Chilean season is wrapping up; supplies are scarce. Production will accelerate in Baja, Mexico in April; the California and Florida seasons will also start at that time. Quality is average: fruit is plump, sweet, and juicy. Sugar levels range from 14 to 18 Brix.





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## **BOK CHOY**

Tight supplies, high prices.

## **BROCCOLI**

Prices are up. Despite higher temperatures in Salinas and Santa Maria, California this past weekend, volume is low. Mexican stocks are limited also; the season is winding down. Quality is best in California: stalks are firm and florets are compact.

## **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 round 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**

Expect tight stocks and high prices as the desert season has ended. California production is slow, but will increase slightly due to warm temperatures in Salinas.

## **CELERY**

The market should remain stable until the Arizona season ends in two weeks. Supplies are ample in Oxnard, California. Quality is excellent.

## **CILANTRO**

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

## **CUCUMBERS**

**EAST:** Most supplies still coming offshore but the volume continues to wind down. Supers are tight with higher FOB prices. Selects are also a little higher. Our FL fields have begun with light volume. We are still about 2 weeks away from meaningful volume out of these fields. Offshore quality is still generally good but becoming more variable.

**WEST:** Rains, which are causing virus issues, have affected both quantity and quality of Nogales crossings. FOB prices are higher on all grades. We are seeing our first crossings of the season at Baja. It will be about two weeks for volume to get up to speed. Quality out of these new fields is better.

## **EGGPLANT**

**EAST:** Eggs continue to be in short supply but improving which is putting downward pressure on FOB prices. Quality continues to be variable due to rains and wind.

**WEST:** Supplies continue to be strong. FOB prices are seeing downward pressures. Quality is good.

## **FENNEL/ANISE**

Fennel supplies will be steady for the week. Salinas has started with good supplies.

## **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.



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## GREEN BEANS

Availability is plentiful in Nogales, generally steady in Florida.

## GREEN CABBAGE

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 week.

## 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 West Coast.

## LEMONS

Market is steady as we are packing dist. 1 and dist. 2 fruit, with heavier volume being dist. 1. Overall quality looks good with excellent color, 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

Prices are expected to become slightly higher. Growers are harvesting in Arizona and Huron, California. Quality is very good: insect pressure is a minor issue in Huron.

## ICEBERG LETTUCE

Prices are steady; the Arizona season is wrapping up, while the Huron harvest has just begun. Some insect pressure is expected in Huron lots.

## ROMAINE

Strong demand has pushed up prices. The Arizona season is ending; growers have begun production in Huron and Salinas. New crop quality problems include insect pressure and low weights.

## ROMAINE HEARTS

Supplies will be about average this week; this is the last week of harvest in the Yuma area. Harvest in the Salinas area has begun 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

The onion market continues to strengthen as the majority of sheds in Idaho have finished for the season, and onions are in fewer hands. Warmer temperatures in the Northwest have negatively impacted the long term storage of onions and shrink and cull numbers are up significantly. Typically around this time, there are supplies of Mexican onions crossing through South Texas as well as the start of the Texas domestic crop. Cold temperatures and rain have delayed crossing, and there are differing reports of crop damage as well (as much as 30% is believed).

## 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



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as the gib helps to slow maturity of the fruit so we have strong mature fruit for later in the season. Volumes of 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 continue to be strong and quality continues to be very good. FOB prices are steady on Jumbos XL and L. Choice grades are seeing some upward pressure.

**WEST:** Nogales is the major sourcing crossing point. As reported last week, rains are causing virus issues which have lowered yields. FOB prices are steady with some downward pressure.

## **PEPPER (JALAPEÑOS)**

**EAST:** FOB prices generally steady. Quality is good.

**WEST:** Quality is good. FOB prices are generally steady with downward pressure.

## **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.

## **IDAHO POTATOES**

The Idaho potato market remains stable. Larger size cartons have gotten a bit tight and there have been small increases on these sizes. There remain deals to be had on 2's and small spuds.

## **RASPBERRIES**

Prices are stable; 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.

## **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.

## **GREEN SQUASH**

**EAST:** Supplies are tight. FOB prices are up over last week. Quality is variable.

**WEST:** Supplies a little more available but still tight. Seeing some weakness in FOB prices. Quality continues to be variable.

## **YELLOW SQUASH**

**EAST:** Supplies continue to be extremely tight due to the recent weather and quality is fair at best due to scarring and decay. FOB prices are up by several dollars compared to last week.

**WEST:** Supplies continue to be very tight. Quality is variable. FOB prices stronger than last week. We are still about 2 weeks away from new crops in new fields.





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## STRAWBERRIES

Weak demand and increased supplies have eased prices, but the market will rise as Easter nears. California's high temperatures may lead to soft texture, increased bruising and bleeding, and smaller berry size. Production is winding down in Florida and Mexico.

## TOMATOES

### EAST

#### Rounds

The demand and supply for 5x6's have remained relatively stable which has caused FOB prices to remain steady. Supplies of 6x6's and 6x7's have increased and FOB prices have fallen on both sizes as a result. We think that we may see a sort-term bump in prices within the next week or two as a result of the cold spell from several weeks ago. Quality continues to be very good.

#### Romas

Romas are in critically short supply in both Florida and Mexico. The shortage in Florida is due mainly to the lack of acreage planted and in Mexico to the rainy growing season they have experienced. The lack of supplies nationwide is putting strong upward pressure on all romas. Quality is good.

#### Grapes

FOB prices remain steady at the lowest levels and supplies over run demand. Quality remains very good.

#### Cherries

Good supplies and weak demand continues. FOB prices generally steady this week. Quality is very good.

## WEST/MEXICO

#### Rounds

Supplies and demand continue to be weak. FOB prices are down slightly on all sizes. Quality has become variable due to some skin checking due to the rains but good quality can be found.

#### Romas

Rains have had a dramatic effect on the amount of supplies crossing at Nogales. Crossings at McAllen are very slow. FOB prices have dramatically jumped again this week over last week. Poor quality fruit is the norm with the better quality in very short supply and demanding a premium.

#### Grapes

Supplies are crossing at Baja and Nogales. FOB prices have risen slightly above Suspension Agreement Minimums. Quality is variable.

#### Cherries

FOB prices are up slightly. 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.