

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending April 10, 2015

COMMODITY	PRICE	QUALITY	PRICE TREND
Avocados-Californian & Mexican	Moderate	Good	↑
Blackberries, Blueberries, Raspberries	Moderate	Good	↔
Strawberries	Low	Good	↔
Grapefruit, Pineapples, Lemons, Oranges, Navels	Moderate	Good	↔
Limes	High	Excellent	↑
Green & Red Leaf Lettuces	Low to Moderate	Good	↔
Iceberg Lettuce	Low	Good	↔
Romaine Lettuce	Moderate	Good	↔
Romaine Hearts	Moderate	Good	↓
Cucumbers	Low	Excellent	↓
Green Beans	Moderate to High	Good	↑
Green Bell Peppers	Moderate to High	Fair to Good	↑
Red Bell Peppers	Moderate to High	Good	↑
Yellow Squash	Moderate	Good	↓
Zucchini	Low to Moderate	Good	↓
Green & Red Seedless Grapes, Bok Choy, Napa, Spring Mix	High	Good	↔
Plums	Moderate	Good	↔
Cantaloupes	High	Good	↔
Honeydews	Moderate	Good	↔
Artichokes	Moderate to High	Good	↔
Arugula, Frisee, Fennel/Anise, Mache	Moderate	Good	↔
Asparagus	Moderate	Good	↓
Broccoli, Bunched Spinach	Moderate	Excellent	↔
Carrots, Baby Spinach	Moderate	Good	↑
Cauliflower	High	Good	↔
Celery	Low	Good	↔
Peeled Garlic	Extreme	Good	↔
Green Cabbage	Low to Moderate	Excellent	↔
Green Onions	Moderate	Good	↑
Kale (Green), Parsley (Curly & Italian)	Low to Moderate	Excellent	↔
Red Cabbage	High	Fair	↔
Snow & Sugar Snap Peas	High to Extreme	Poor to Fair	↔
Red, Yellow, White Onions, 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 lime market continues to climb higher with limited supply out of Mexico, making for a demand exceeds supply market. Historically, limes usually escalate towards the end of winter and beginning of spring with limited production, but the rain and hail throughout March magnified this spike significantly (this week alone prices are about \$15-20 higher). These conditions are projected to last until May. Supply on lettuce, green leaf, red leaf and romaine are normal. The Roma tomato market is normal and prices have lowered. Most all herbs remain steady and in fairly good supply and quality. Rain is in the weekend forecast for Southern Mexico, which will effect late-season blackberries and strawberries. Berries in Oxnard finished early due to quality issue and we anticipate the strawberry market to tighten up. The cauliflower market remains extremely tight with poor quality and an escalation in price. We are hoping to see an improvement next week.

## APPLES & PEARS

The Washington market is weak. Supplies are abundant, especially large sizes. Quality is excellent: sugar levels are high, measuring 14 to 18 Brix. The pear market is level. D'Anjou stocks will be on the market through July. Sugar levels range from 12 to 14 Brix.

## ARTICHOKES

Lighter supplies are forecasted this week and for the coming weeks. The chokes are frost-free with excellent quality. Sizing is estimated to be heaviest to 24s. Light supplies are forecasted on 12s and 18s. Prices should be steady to higher this week.

## ARUGULA

Supplies of both baby and wild arugula are very limited with 10 week averages in effect. Expect some yellowing and mildew.

## ASPARAGUS

Prices are stable despite strong demand and limited stocks. Expect California supplies to reach volume levels by mid-April. Quality is excellent in North America: flavor is grassy, texture is firm, and stalks are straight.

## AVOCADOS

The market is steady; stocks are becoming more plentiful. Mexican fruit requires less ripening time than California supplies due to higher oil content. Expect dark green/black skin color and rough texture in late crop Mexican

fruit. Overall quality remains very good. New crop Peruvian stocks will be on the market in mid- to late April.

## 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. Problems are also being experienced with the government of Ecuador. They are enforcing a policy where growers cannot sell more than a certain percentage of their bananas on the open market, which is an "auction market" for the industry. This, combined with the strong demand from Russian companies, has led to extremely high prices for spot market bananas. This is estimated to continue through April. Please be aware of a shortage in the banana market and an increase in price.

## BLACKBERRIES

High prices persist. The crop is recovering from damage caused by rain and hail in Central Mexico; good quality fruit is limited. Supplies will increase and quality will improve after Easter. Sugar levels range from 12 to 13 Brix.



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## BLUEBERRIES

The market will remain elevated until growers finish harvesting transitions in California, Florida, and Baja, Mexico. During these moves, pack size will change from 4.4-ounce to 6-ounce clamshells. Expect high prices through the month of April. Sugar levels range from 14 to 18 Brix.

## BOK CHOY

Tight supplies, high prices.

## BROCCOLI

Prices are beginning to inch down slightly. California volume is increasing. The Mexican season is ending. Quality is best in California: stalks are firm and florets are deep green and compact.

## CANTALOUPE

The market is easing; offshore supplies are increasing. New crop Mexican melons will be available in approximately two weeks. Sugar levels are high, ranging from 13 to 14 Brix.

## CARROTS

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

## CAULIFLOWER

Strong demand is keeping prices high; stocks should increase over the next two weeks. Quality is very good: color is snowy white.

## CELERY

The market is near the bottom. The Arizona season is ending, but supplies are ample in Oxnard, California. Quality is excellent.

## CUCUMBERS

**EAST:** The gap situation is coming to an end as more cucumbers come on-line out of FL fields. Very few off-shores available and their quality is suspect. FOB prices down compared to last week.

**WEST:** More supplies available as cukes begin to cross at Baja this week. FOB prices generally down due to this increase of supplies. Still seeing quality issues due to the rainy growing season.

## EGGPLANT

**EAST:** Few fancies are available. FOB pricing of fancy and choice grades is up compared to last week.

**WEST:** Supplies continue to tighten up causing higher FOB prices.

## FENNEL/ANISE

Supplies this week are projected to be extremely light this week with fields being almost a month ahead of schedule. Percentages will remain predominately 24's and 30's. The market should remain very active this week with Easter demand.

## 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. On the domestic side, the demand continues to remain high/moderate, and supplies are still tight, but we are seeing it ease up.

## GINGER

The ginger market has improved, prices are moderate and will continue to be moderate.

## GRAPES

The Thompson and Sugraone green seedless markets and Crimson red seedless prices have eased slightly, but should rebound when the Chilean season winds down in a few weeks. The Mexican season will begin in mid-May.

## GREEN BEANS

The harvest in Mexico will be finished by mid-April; new crop round beans are now available in Coachella at a substantial price premium. Good supplies in Florida; prices have rebounded from bottom levels.

## GREEN CABBAGE

Production out of Yuma is finishing this week. The industry is slightly heavy on volume; warm temperatures have brought fields forward. Demand is expected to pick up after Easter and supplies should be normal.

## GREEN ONIONS

As with most Mexican bunch items, green onions will be affected by the Easter holiday. Supplies will be low. Current pricing on pencils is low with mediums average. Quality is good with some insect pressure due to heat. Demand is expected to be good and market should rise this week.





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## HONEYDEW

The market is level; supplies are sufficient in all areas. Quality is very good: sugar levels range from 11-13 Brix.

## KALE (GREEN)

Plentiful supplies continue. Overall quality and appearance continue to be very nice. Bunches are averaging 12-14" 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 in a week.

## LEMONS

Expect the market to slowly climb through the summer, especially 140-count and smaller sizes. Quality is very good: lemons are tart and juicy.

## GREEN LEAF/VARIETY LETTUCE

Prices are a bit higher than last week. The Arizona desert and Huron seasons are ending. Growers have begun production in Salinas. Quality is very good, but insect pressure is a minor issue in Huron.

## ICEBERG LETTUCE

Prices are weak. Although the Arizona season is ending, production is underway in Huron and Salinas. Head weights are light, but increasing.

## ROMAINE LETTUCE

Prices are starting to inch down. The Huron season has ended; growers will finish harvesting in Arizona this week. Salinas production is increasing.

## ROMAINE HEARTS

Supplies will be good for this week; currently 10-14 days ahead of schedule. Overall quality remains good with good cupping, and color on all hearts. We are seeing insects in the field.

## LIMES

The lime market continues to climb higher with limited supply out of Mexico, making for a demand exceeds supply market. Historically, limes usually escalate towards the end of winter and beginning of spring with limited production, but the rain and hail throughout March magnified this spike significantly (this week alone prices are about \$15-20 higher). These conditions are projected to last until May.

## NAPA

Limited supplies, high prices.

## ONIONS

The FOB market out of Idaho/Oregon has steadied a bit this week. New crop California will be ready by April 21st. This only gives Idaho about three weeks where they won't be competing against significant volume of new crop onions. For this reason we probably will see only minimal FOB increase on yellows as most shed are just looking to keep the current volume which will enable them to wrap up the season by the end of April. The CA crop looks very nice and will have some very good size.

## ORANGES

California prices will climb due to diminishing Navel supplies and the transition into new crop CA Valencia fruit.

## PARSLEY (CURLY, ITALIAN)

Plentiful supplies in coastal Southern California and Western Arizona. Bunches are averaging 8-11 inches in length and showing dark green color.

## GREEN BELL PEPPER

**EAST:** Lighter volume and more variable quality due to past rains and cool weather. Upward pressure on FOB prices, especially on the larger sizes.

**WEST:** Larger sizes are in limited in supply. Demand on other sizes and grades has increased this week which is putting upward pressure on FOB prices.

## JALAPEÑO PEPPER

**EAST:** FOB prices are generally steady compared to last week but there is upward pressure on those prices. Quality is good.

**WEST:** Quality is good. FOB prices are up \$1 to \$2.

## RED AND YELLOW PEPPER

Although stocks are diminishing, the market is stable; the Mexican season is wrapping up. Quality is very good, although softness is a minor issue due to recent rain. New crop California production will start by mid- to late April.

## PINEAPPLE

Weak demand is easing prices; supplies are adequate. Quality is best in Costa Rica; bruising is a slight problem in some lots. Sugar levels range from 13 to 14 Brix.



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## IDAHO POTATOES

Another week where small potatoes show no strength and the large potatoes bump up a little more. 40's and 50's are still the biggest stumbling point with all the sheds in the state.

## RASPBERRIES

The market is stable despite strong demand for Easter. New crop California fruit is on the market; supplies are tight, but quality is very good. Mexican supplies will remain sporadic due to transfer and weather challenges. Expect volume to increase this month.

## RED CABBAGE

Yuma production of red cabbage ended last week and central coast has started this week. There are consistent supplies and quality is very nice. Color, weight and sizing from the new growing region are anticipated to be great with medium sizing.

## SALADS & BLENDS

The market is level; raw product stocks will be harvested in Arizona through mid-April. Quality issues such as dense lettuce/chunks, pinking, growth cracking, and increased insect pressure may become present due to high temperatures.

## 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 with sightings of minor yellowing.

## SPINACH (BUNCHED)

Supplies are expected to be back to normal in Salinas next week. Demand is fair and overall quality is excellent; large and full bunches of 11-12 inches in length, 21-23 lbs. weights with dark green color. Steady market.

## SPRING MIX

Prices are unchanged. Growers are harvesting in Salinas; the Yuma season will end in two weeks.

## GREEN SQUASH

**EAST:** Like the yellow, supplies are good from various sources and quality is variable. Medium pricing is generally steady while the pricing of the large zukes is weaker.

**WEST:** Good volume crossing with variable quality. FOB prices are generally down.

## YELLOW SQUASH

**EAST:** Good volume out of Homestead, Immokalee and Plant City. Quality is variable. FOB prices are down again this week due to the increase of supplies. Quality is variable.

**WEST:** Rains all growing season long are taking their toll on quality. FOB prices are generally down slightly.

## STRAWBERRIES

Although strawberry supplies are sufficient, strong demand for the Easter holiday has pushed up prices. Production is winding down in Florida and Mexico.

## TOMATOES

### EAST

#### Rounds

Demand is stronger nationwide as spring brings in warmer weather. At the same time we are entering a small gap situation as our Immokalee crop winds down and the Ruskin crop is still several weeks away. We do not expect this gap situation to be long-lived or extreme but there will be upward pressure on FOB prices for the next several weeks. For next week, FOB prices on 5x6's are up a couple of dollars and the 6x6 and 6x7s are up \$1. Quality is fair to good. Quality of the Ruskin crop is looking very good.

#### Romas

FOB prices are down again this week as more supplies come on-line. Prices are down \$4 to \$5 depending on size. Quality remains good.

#### Grapes

Demand stronger and supplies are weaker as the volume out of our Immokalee fields start to wind down. FOB prices up about \$1 on 12/1pt flats. Quality remains good.

#### Cherries

FOB prices up slightly (about \$.50) as demand increases. Quality is good.



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## **TOMATOES**

### **WEST/MEXICO**

#### **Rounds**

Wide variable of quality and FOB pricing found. Mature greens are generally about \$1 lower compared to last week. The vine ripe market is also generally lower with a wide degree of variability in quality. Volume of mature greens will continue to drop off over the next several weeks while the supply of vine ripers should remain adequate for the next month. Rounds will begin to cross at Baja in about two weeks.

#### **Romas**

New fields are bringing in ample supplies which are driving FOB prices toward Suspension Agreement minimums.

#### **Grapes**

Two markets have developed in the west. The older fields have questionable quality whereas the new fields are bringing a higher FOB price due to their better quality.

#### **Cherries**

FOB prices are up slightly. Quality continues to be variable due to splits and color.

## **TREE FRUIT**

Prices are up. The Chilean season is ending; nectarine, peach, and plum stocks are limited. Quality is good, but light bruising and soft spots are minor problems. The new crop California season will start in late April/early May.

## **WATERMELON**

Although supplies are increasing in Mexico, the market is high. The offshore season is ending. New crop harvesting will begin in Florida and Texas in approximately two weeks. Quality is very good: sugar levels range from 10 to 12 Brix.