

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending April 17, 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 to Moderate	Good	↑
Romaine Lettuce	Moderate	Excellent	↔
Romaine Hearts	Moderate	Excellent	↔
Cucumbers	Low to Moderate	Good	↔
Green Beans	High to Extreme	Good	↔
Green Bell Peppers	Moderate to High	Fair to Good	↑
Red Bell Peppers	Moderate to High	Good	↑
Yellow Squash	Low	Good	↓
Zucchini	Low	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	Excellent	↔
Arugula, Frisee, Fennel/Anise, Mache, Broccoli	Moderate	Good	↔
Asparagus	Moderate	Good	↓
Bunched Spinach, Parsley (Curly & Italian)	Moderate	Excellent	↔
Carrots, Baby Spinach	Moderate	Good	↑
Cauliflower	High	Good	↔
Celery	Low	Good	↔
Peeled Garlic	Extreme	Good	↔
Green Cabbage	Low to Moderate	Good	↔
Green Onions	Moderate	Fair	↑
Kale (Green)	Low to Moderate	Excellent	↔
Red Cabbage	High	Good	↔
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	Moderate	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 transition from Yuma to Salinas/Santa Maria is mostly complete, with only a small handful of items still finishing up their desert deal. There is slight volatility that can be seen with some items due to this transition, but there are no major supply shortages right now to cause drastic or significant market increases. As was mentioned in the newsletter last week, supplies for broccoli and cauliflower have returned back to about normal this week, which has stabilized these markets. For limes, the market is still strong as demand far outweighs the limited supplies. Conditions are still expected to be this way until May. Squash markets, especially zucchini and yellow straight-neck, have come down this week with spring harvests out of Mexico and Florida helping national supply. Roma tomatoes are lower this week since supplies out of Mexico have increased. The other tomato markets are about steady right now.

APPLES & PEARS

Washington prices remain low. The majority of storage stocks are ample, especially the Red Delicious variety. Honeycrisp supplies are tight. Sugar levels are high, measuring 14 to 18 Brix (sugar to acid ratio). Pear prices are unchanged. D'Anjou supplies 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 24s and smaller. Prices should be steady to higher this week. Volume is estimated to increase in May.

ARUGULA

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

ASPARAGUS

The market is level despite strong demand. California production has begun, but this week's rain may limit harvesting.

AVOCADOS

Prices are stable. California supplies are increasing, while Mexican fruit remains ample. Expect Mexican stocks to require less ripening time than California supplies due to higher oil content. Overall quality is very good. New crop

Peruvian stocks will be on the market in late April/early May; the crop will be dominated by large sizes.

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

The market is elevated, but should begin to ease soon. Supplies are increasing and quality is improving after recent damage caused by rain/ hail in Central Mexico. The California season will begin next month. Sugar levels range from 12 to 13 Brix.



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BLUEBERRIES

Prices are high due to harvesting transitions in California, Florida, and Baja, Mexico. Growers are switching between the 4.4-ounce pack size and 6-ounce clamshells. The market will remain elevated through April. Domestic quality is best: fruit is sweet and firm.

BOK CHOY

Tight supplies, high prices.

BROCCOLI

Although prices are level, this week's Salinas rain may push them up a bit; growth may slow and production may be delayed. The Mexican season is winding down. Quality is best in California: stalks are firm and florets are deep green and compact.

CANTALOUPE

Market is steady with good supplies of fruit on the east coast and lighter supplies here on the west coast. We expect to see some better volume on the west coast next week and will see enough volume to bridge the gap until we start the California/Arizona desert. The overall quality of the offshore fruit is nice with mostly a green cast and some sunken areas showing but for the most part a nice clean melon that is eating very good as well. We expect to start the California/Arizona desert around the first of May and are expecting good volume and excellent quality as the temperatures in the desert are on the cooler side which will help finish the fruit nicely if it continues. 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 persists; the market is elevated. Rain and cool temperatures will keep supplies limited for the next two weeks. Quality is very good.

CELERY

Prices are low; stocks are plentiful in Oxnard, California. Quality is excellent: stalks are crunchy and straight with zesty flavor.

CUCUMBERS

EAST: More supplies out of FL fields are putting downward pressure on FOB prices. Quality is generally good.

WEST: FOB prices generally down due to an increase of supplies. Still seeing quality issues due to the rainy growing season. Crossings continue to start up through Baja with light volumes.

EGGPLANT

EAST: FOB pricing of fancy and choice grades generally steady compared to last week. There is some slight downward pressure on the choice price. Quality continues to be variable.

FENNEL/ANISE

Fennel supplies are once again projected to be extremely light this week with fields being over a month ahead of schedule. We are projected to be extremely light the next two weeks and possibly have a gap in production the week of 4/20-4/25.

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. However, we are seeing it ease up.

GINGER

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

GRAPES

Market is steady on reds as there is descent supplies of reds on both coasts and there is a very wide range of quality and price on green grapes on both coasts. The Marketing order goes into effect now which all fruit arriving in the USA must meet US #1 standards, so there will still be a few reds still arriving over the next few weeks, but the green grapes that are here will be what will carry us until we start Mexico and California fruit. Expect the red market to keep steady and possibly ease upwards in a couple of weeks, the green grapes will definitely strengthen on the storage fruit that is here and is solid or has been repacked. We expect to get started in Mexico and California desert around the first of May and will see good volume by the second week of May. The overall California and Mexico crop looks very good and should have good supplies with very nice quality.



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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

Santa Maria production will begin this weekend. Quality should be very nice though heads will be slightly smaller than normal. Starting next week supplies will increase.

GREEN ONIONS

Supplies will be a bit low resulting in higher prices next week. Quality is good despite some bug pressure from the hot days in the desert. Good supplies are expected this weekend.

HONEYDEW

Market very strong as demand is very good and supplies are on the tighter side on both coasts, the overall quality of the offshore fruit is good with a green to cream cast and excellent color and sugar. We expect to start Mexico dewes around the first of May and then start the California/Arizona around the second week of May. We expect good supplies of dewes by that second week of May and then off to the races. Quality is very good: sugar levels range from 11 to 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

Market strengthening and very strong on all sizes as we are finishing Dist. 1 and depending on dist. 2 to satisfy demand, which is a little sooner than normal. The dist. 2 crop is of normal volume but fruit is on the smaller side which we are all trying to wait for fruit to size up a bit and in time we will see fruit size up. The overall quality is fair with some blocks on the weaker side and overall fruit strength is fair, the internal juice is good and color is a little checkerboard. Expect the market to continue to strengthen as we approach the summer months and

hopefully we will not run into our supply situation that we have had the past 2 years from July to September.

GREEN LEAF/VARIETY LETTUCE

The market is slightly higher than last week. The Arizona desert and Huron seasons have ended. This week's rain will tighten Salinas supplies. Quality is very good, but issues may arise from the rain storms.

ICEBERG LETTUCE

The market is rising. The Arizona and Huron seasons have ended; rain will hinder harvesting in Salinas this week. Quality is good, but mildew is a slight issue.

ROMAINE

Rain in Salinas will cause the market to inch up this week. Quality should remain very good, but mildew and mechanical damage will become minor issues.

ROMAINE HEARTS

Supplies will be close to average for this week. We are currently 10-12 days ahead of schedule. Overall quality remains good; good cupping and color on all hearts. We are starting to see some insect pressure from the surrounding hills, due to the lack of rain in the area.

LIMES

The market is inching down, especially for small sizes. New crop supplies continue to increase. Quality is very good: fruit is plump, juicy, and tart.

NAPA

Improved supplies. Market has stabilized.

ONIONS

Storage crop supplies are still good and demand is average. New crop Mexican onions are crossing into the USA. Quality varies between horrible and just decent. Because the quality is so inconsistent, the demand for storage crop is also decent, keeping the FOB's steady. Texas supplies regarding quality and availability is not expected to be much better because of weather issues. California will begin shipping from the Imperial Valley within the next two weeks and should alleviate some of the supply gaps that are likely to happen as the storage crop winds down.



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ORANGES

Market is strengthening especially on the 88's and smaller as we are getting into later varieties and our gibbed fruit that is peaking on 56's /48's/72's, we will continue to see this trend as we go forward through the navel season which could last through June depending on weather. We will start a few Valencia's in about 2 weeks which will have some smaller size and that will help the supply situation but prices will probably be about the same as navels due to the high demand of smaller fruit. The navels still have excellent sugar but are showing some separation and fruit overall is on the weaker side due to less than desirable water and little to no acid in the fruit.

PARSLEY (CURLY, ITALIAN)

Steady supplies are expected for the next three weeks. Bunches are averaging 8-11 inches in length and showing dark green color, excellent quality.

GREEN BELL PEPPER

EAST: Supplies are short in the west and critically short in the east which has caused double digit increases in FOB prices on all sizes and grades. This critical shortage will last about two weeks as we await the Plant City fields to produce a harvest. Quality remains variable.

WEST: Very limited supplies available. Prices of all sizes and grades have increased this week. Northern fields have just started but not with enough volume to effect the market.

JALAPEÑO PEPPER

EAST: FOB prices are generally steady with downward pressure compared to last week. Quality is good.

WEST: Quality is good. FOB prices are down slightly.

RED AND YELLOW PEPPER

Prices will continue to climb until the new crop California harvest starts in mid-May. Harvesting in mainland Mexico is winding down; light production has begun in Baja. Quality is very good: softness is a slight problem.

PINEAPPLE

Tight availability will continue through Easter. Inbound vessels from Costa Rica have made late arrivals due to adverse weather conditions along the East Coast. The supply situation will not improve until mid-April.

POTATOES

Small sizes (80- through 100-count stocks) dominate storage supplies; large potatoes (40- through 70-count sizes) are extremely limited. The Norkotah variety will be on the market through this month.

RASPBERRIES

Although demand is strong, the market is steady. New crop California supplies are limited, but volume is increasing. Mexican stocks will be sporadic through April due to transfer and weather challenges.

RED CABBAGE

Red cabbage production is now coming from Santa Maria. Quality is very nice with good color and head size. Shorter supplies have kept the market steady.

SALADS & BLENDS

Prices are unchanged; this is the last week of harvesting in Arizona. Quality issues include dense lettuce/chunks, pinking, rib blight, and shortened shelf-life. Expect quality to improve 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 with sightings of minor yellowing.

SPINACH (BUNCHED)

Yields are strong and demand is heavy. Quality is excellent with large and full bunches. Weights are 21-23 lbs. and lengths of 10-11". Current light rain can cause some mildew problems in the future.

SPRING MIX

The market is level. Growers are nearly done moving to Salinas; the Yuma season will end this week. We recommend ordering for quick turnaround due to heat-related quality problems. As always, maintaining the cold chain throughout distribution is critical.

GREEN SQUASH

EAST: Like the yellow, supplies are good from various sources and quality is variable. Medium pricing is generally down compared to last week.



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WEST: Good volume continues to cross with variable quality. FOB prices are generally steady with slight downward pressure.

YELLOW SQUASH

EAST: Good volume out of Homestead, Immokalee and Plant City. GA should begin harvesting in the next 2 to 3 weeks. FOB prices are down again this week due to the increase of supplies. Quality is variable.

WEST: Rains all growing season long continue to take a toll on quality. FOB prices continue to be at low levels.

STRAWBERRIES

The market is active; demand is strong. Expect diminished quality and limited availability of four-pound clam-shell packs due to rain.

TOMATOES

EAST

Rounds

Our Immokalee crop is starting to wind down with about two weeks of harvesting left. Each day will produce lighter and lighter volume. The Ruskin crop is about 7-10 days away. As we predicted last week, any gap situation will be short-lived and mild. For next week, FOB prices of 5x6's are generally steady and the 6x6 and 6x7s are up slightly. Quality is becoming more variable as we come to the end of the Immokalee crop. Quality of the Ruskin crop is looking very good.

Romas

FOB prices are down slightly this week on Ex-Large and Large sizes and generally steady on mediums. Supplies continue to be strong and quality is very good.

Grapes

A few more supplies are putting downward pressure on FOB prices this week. 12/1pt flats are down slightly compared to last week. Quality is very good.

Cherries

Stronger demand continues to put slight upward pressure on cherry tomatoes this week. Quality is very good.

WEST/MEXICO

Rounds

The mature green crop is coming to an end with about 2 weeks left in the season. Quality is becoming more variable as the age of the vines and warmer weather begin to take their toll. The mature green market is generally steady from last week. The vine ripe market is flush with supplies and supplies should remain plentiful for the next month or two. Baja crossings should begin by early May.

Romas

New fields are bringing in ample supplies which are keeping FOB prices at or near Suspension Agreement minimums. Quality is variable.

Grapes

Two markets continue in the west. The older fields with questionable quality cannot charge what the quality fruit out of the newer fields is demanding.

Cherries

A few more supplies are available this week putting downward pressure on FOB prices. Quality continues to be variable due to splits and color but is generally improving.

TREE FRUIT

The Chilean season has ended. The new crop California season will begin in late April/ early May.

WATERMELON

Strong demand and decreasing offshore stocks are keeping prices elevated. Mexican supplies are increasing. New crop production will start in Florida and Texas in a few weeks; the market will ease at that time. Quality is very good: sugar levels range from 10 to 12 Brix.