

FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending May 8, 2015



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

Wet veg items are experiencing a gap in supplies. Even though the transition from Yuma to Salinas was almost completely wrapped up by the first and second weeks of April, there was initially plenty of product coming out of Salinas and Santa Maria to cover the supply. Since the winter was warmer than usual, many fields matured from 12 days to as much as 21 days ahead of schedule; because there has been some cooler weather in the last two weeks, production has slowed back down to initially projected harvest schedules, which has ultimately caused this supply gap. Weather has also had a negative effect on the quality of certain crops as well, which ultimately brings the yields below normal. Simply put, growers are not seeing the numbers they hoped for. Green and Red leaf supplies are light. Green leaf is in an extreme market. Romaine is below average while Romaine hearts are average. Regarding the drought: as Salinas is entering in to its fourth year of the drought, there are no new restrictions on water usage, but there is a chance that some of the older and more shallow wells will run dry in 2015. Growers are utilizing drip-irrigation and other conservation measures to protect against the drought.

APPLES AND PEARS

Great promotional opportunities continue on 88s and larger of red delicious, 72s and larger of fujis, goldens, cameos, pink ladys and braeburn. Demand is steady, schools are back in session. Small red delicious are a little easier 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

Lighter supplies are forecasted this week and the coming weeks. The chokes are frost free with excellent quality. Sizing is estimated to be 24's 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 good and readily available. Quality is good.

ASPARAGUS

We are not receiving anymore MEX asparagus. We are strictly Peru at the moment. Volume is still not enough to meet demand, and we are experiencing shortages; also still experiencing a shortage in the JMB size. Quality and sizing are excellent. Prices are also rising very quickly. This will remain tight through Mother's Day.

AVOCADOS

Due to lower demand and greater volume coming from Mexico, we are seeing a downward trend in pricing. Smaller sizes (60 and smaller) continue to be the best buy. Quality is excellent with great flavor and oil content.

BANANAS

We are still experiencing a strong market on 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.

BLUEBERRIES

We are seeing the potential in most varieties to have a more concentrated harvest than what we have seen in previous years. S. Florida production is past the peak but still quite a bit of fruit to harvest. Majority of fruit is coming from Emerald, Jewel and Farthing. N. Florida growers remain in peak production window. All mid-season varieties being harvested. Labor and rains have complicated the picking schedule. Georgia harvest started last week. Production will ramp up this week. A quick increase to peak volumes is expected in southern areas.



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N. Carolina, all Southern Highbush and Rabbiteye varieties are in bloom or petal fall. Growers are anticipating harvest around May 16th. Things are looking better in N. Jersey with the movement of Duke. Michigan, very slow advancement in crop development due to rains.

BLACKBERRIES

Both CA and Manfredi look to have decent supplies on 6 oz. blackberries this week, with the majority of this volume in Manfredi. Mexico is still going strong and California is still slow to get started.

BOK CHOY

Tight supplies, high prices.

BROCCOLI

Broccoli supplies are light but projected to improve this week with decent crown material throughout the week. The market should remain strong through the Mother's Day pull as a result of supplies industry wide continuing to be below needs. Quality has remained very strong as weather has been ideal for quality Broccoli. Central Mexico broccoli supplies are steady, quality is very nice and pricing has improved.

CANTALOUPE

We have started new crop California fruit and volumes will continue to increase weekly and should be in full swing by the end of the first week of May. The overall quality looks excellent with good sugar as weather has been excellent in the desert region. There is still a fair amount of offshore fruit that will probably drag on until the second week of May on both coasts, that overall quality is good with some lots showing sunken areas and softer fruit. The overall eating quality of the offshore fruit is excellent with a mostly green cast.

CARROTS

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

CAULIFLOWER

Cauliflower supplies in Salinas and Santa Maria are very light this week. Supplies have not been able to keep up with demand. Quality remains good overall with the majority of 12ct and 9ct packed each day.

CELERY

Demand is good. We are harvesting celery in Santa Maria & Oxnard. The Florida celery crop is finishing up. All celery in Salinas has been transferred from either Santa Maria or Oxnard. Quality is nice in both locations, despite light insect damage leaving some scarring. Weights are

54-58 lbs., dark green color and meaty shanks. 36's are in short supply.

CUCUMBERS

EAST: Good supplies continue but FOB prices are up off of the floor from last week but continue to be at low levels. Quality is generally good.

WEST: Baja crossings have begun and we are seeing better quality. Lesser quality is still available through Nogales.

EGGPLANT

EAST: FOB pricing of fancy and choice grades generally steady compared to last week. Quality continues to be variable.

FENNEL/ANISE

Fennel gap in production will finish this week as we are scheduled to potentially start harvesting again Wednesday 4/29/15. Supplies will be predominately 24's and 30's, as we are trying to get in early in hopes to increase the supply for customer. 18's will be very limited throughout the week. Expect the market to remain active through the Mother's Day pull.

GARLIC

Poor domestic growing conditions and decreased Chinese product availability are negatively impacting supply and price again. Though we have seen some slight relief over the past month, Chinese ports will once again be closed until further notice. Ongoing drought and limited acreage in Southern California will also reduce availability and increase cost for domestic supply. We will provide notification as soon as relief is to be expected.

GINGER

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

GRAPES

Market is steady on reds and very strong on good green grapes, we expect the market to stay steady on reds and strong on greens until we get into full production on California and Mexican grapes which will be around the second week of May. The overall quality on the Chilean reds is good with some lots not as strong as others but fruit is eating good and color is dark and full. The overall Mexico and California crop looks very good with good volume and hopefully will be stronger than last year's crop. Expect the California and Mexico prices to start out very high and by the third week of May we should see things ease up a bit.



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GREEN BEANS

A supply gap is developing in both Florida and California; demand exceeds supply. This shortage is expected to continue through mid-May.

GREEN CABBAGE

Volume is steady this week with medium to large sizing available from most fields. Weights are between 50-55 lbs., and color is very nice. Any external leaf problems are removed at field level, so quality is very nice.

GREEN ONIONS

The green onion market was softer late last week. This week pricing is generally \$2.00 less this week than last week due to increased production, increasing the 7 day volume average for Mexico border crossings. We anticipate demand will increase mid to late week, due to Cinco de Mayo and Mother's Day holiday's pull. Consequently, we will most likely see the market remain steady this week. Overall quality is good despite continued issues with bug pressure, which is normal for this time of year.

HONEYDEW

Market is steady but will start to ease as the Mexico volume continues to increase and we start some California fruit around the second week of May. The offshore volume is starting to decline but still fruit around on both coasts. The overall quality of the fruit out of Mexico and offshore fruit is very good with a green to cream cast and good internal color and sugar. We expect very good supplies by the second week of May and will continue with good volume through the summer out here in California.

KALE (GREEN)

Light supplies continue this week. Overall quality and appearance continue to be good. Bunches are averaging 10-12" 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 very strong as demand exceeds supply as we are solely dependent upon Dist. 2 fruit which is on the small side and will hopefully see things size up as we have a normal volume size crop but due to a lack of water the fruit is slowly sizing up. The overall quality is fair as the lack of water has put stress on the trees and the fruit,

the overall quality is erratic, the color and juice content is good. Expect prices to continue to climb as we go forward and hopefully we do not run into any major supply gaps as we approach July and August.

LIMES (PERSIAN)

It appears that we will have three weeks of short supplies. Prices have moderated but are still high. We hope to see this drop each week, Cinco de Mayo may throw off the decline.

GREEN AND RED LEAF

We are expected to be short supplied this week on green and red leaf. Green and red Leaf are 22-23 lbs. with light mildew and light fringe burn.

ICEBERG LETTUCE

Light supplies of lettuce are available in Salinas. Quality is fine, weights are in the low to mid- forties. We have a less than average amount of thirties. Salinas is now the predominant district as other areas are winding down or have finished. Prices should be steady to higher as we move into the weekend.

ROMAINE

We are expected to be slightly below average this week on Romaine. Quality is good overall but we may see some light mildew on the outer leaves. Heavy insect pressure in the fields. The carton is 36-37 lbs., dark green color and 11-13" in head sizes.

ROMAINE HEARTS

Overall supplies will be close to average. Demand is very good. Quality continues to be good and expected to continue so for the coming weeks. We are seeing cupping, and a good ratio of green to bleached coloring. Due to the dry conditions throughout the Valley, but pressure is evident. Great care is being taken to minimize that issue.

NAPA

Improved supplies. Market has stabilized.

ONIONS

New crop from Texas is a disaster due to weather. Quality and availability remain uncertain for shipments this week and next week. California is shipping at full capacity on all three colors. Quality is gorgeous, and sizing is peaking on Jumbo. The San Joaquin Valley and New Mexico will begin shipping the first week in June.



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ORANGES

Market strong on 88's and smaller with prices increasing and will continue to do so as we are peaking on 56's and 72's and will continue to see bigger sizes on the navel's and demand exceeds supply on the 113's and 138's. We have started Valencia's and are seeing some smaller fruit to help ease the situation but not enough volume to see the price ease and we will probably not see that due to the Valencia crop being 20% lighter in volume than normal. The overall quality of the fruit is good to fair with some fruit weaker than others due to our lack of water and warmer than normal temperatures. Expect the market to stay strong and towards the middle of August we will probably see high prices and very few 88's and smaller.

PARSLEY (CURLY, ITALIAN)

Parsley supplies are up this week from last. Overall quality and appearance continues to be very nice with bunches averaging 8-10 inches in length and showing dark green color.

GREEN BELL PEPPER

EAST: The rains for the past week have affected supplies and quality of peppers in the east. FOB prices are higher on all sizes and grades. Our GA crop is about a week away from harvest ready.

WEST: Ample supplies continue to put downward pressures on Western FOB prices. Crossings continue to come across at Nogales. Quality has become more variable.

JALAPEÑO PEPPER

EAST: Supplies much tighter this week. FOB prices up moderately.

WEST: FOB prices are generally steady with good quality.

RED AND YELLOW BELL PEPPER

The California season has begun; volume will increase later this month. Baja peppers (into San Diego) are adequate, preventing a supply gap.

PINEAPPLE

Prices are unchanged. Large sizes are tight in Costa Rica. Quality is very good: flavor is tangy, yet sweet. Sugar levels range from 13 to 14 Brix.

POTATOES (IDAHO)

All same as recent weeks. Larger sizes have slightly better availability this week. Small size cartons from 80ct and smaller are readily available. Quality is good, and most packers expect to have supplies deep into the summer.

RASPBERRIES

Mexico continues to perform with decent volumes on both coasts (Manfredi/Oxnard/Watsonville). Most of the volume is in Manfredi. California fruit continues to come on slowly, and will start increasing little by little each week.

RED CABBAGE

While red cabbage quality overall is very nice, sizing is somewhat smaller, but retains good weight. The supplies and market will be steady this week.

SALADS & BLENDS

Prices are level; iceberg and romaine stocks are abundant.

SNOW AND SUGAR SNAP PEAS

Snow peas and sugar snaps are still in a strong market. (Peru, Mexico, and California). Prices remain in the highs for both. Quality is good.

SPINACH (BABY)

There are good supplies of baby spinach and clipped spinach. Quality is fair with minor yellowing, oversizing and half leaves.

SPINACH (BUNCHED)

Supplies are average this week after warmer weather brought production back to normal. Demand is very strong, and the market is advancing. Overall quality is excellent; dark emerald green, large and full bunches with lengths of 9-11" and weights 21-23 lbs.

SPRING MIX

Spring mix supplies are very good. Product is showing slight quality issues of yellowing and some oversizing.

GREEN SQUASH

EAST: Good supplies continue from various growing regions. We are seeing slight upward pressure on FOB prices. Quality is variable but good quality can be found.

WEST: Slower crossings has caused FOB prices to be a little stronger again this week. Quality is variable but good quality can be found.



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YELLOW SQUASH

EAST: Supplies are generally steady causing FOB prices to move little from last week. Our GA crop has begun.

WEST: Good supplies continue in the west with little movement of FOB prices.

STRAWBERRIES

California strawberries will remain tight over the next few weeks, as Mother's Day demand is very strong. The most current weather update also shows California remaining cool with a couple chances of rain over the next few weeks. Santa Maria is still in the game, but will remain tight as well. Once we make it through the pull, we will begin to feel things loosen up a bit.

TOMATOES

EAST

Rounds

Hot weather in the growing regions of Florida is causing the tomatoes in those fields to mature quicker this spring and has caused an oversupply of all sizes which is causing FOB prices to fall again this week. We continue to have an "inverted" market as 5x6s are less expensive than the 6x6 and 6x7s. Prices of all sizes are down. We have continued to be a weather pattern which is bringing showers every day. This pattern is expected to break before this weekend and the daily showers should diminish. Supplies should continue strong for the next week or two. However, the hot temperatures may cause these crops to not yield for as long of a time as normal and a gap situation may develop between growing regions within a few weeks. We also expect demand to increase as we get into May which may put additional upward pressure on FOB prices. We will keep you posted. We continue to see a variance in quality due to rains and high temperatures from shipper to shipper and field to field.

Romas

Supplies have improved causing FOB prices to fall on all sizes. Quality remains generally good but we continue to see some variableness in quality due to the rains and heat the fields have been experiencing almost every day.

Grapes

Supplies have improved from last week and FOB prices for the 12/1pt flats are down from last week. Quality is good.

Cherries

Better supplies have caused FOB prices to fall from last week. Quality is generally good but is variable.

WEST/MEXICO

Rounds

The west is experiencing a gap situation for mature greens and is having to look east for supplies. Hot weather in the desert is causing that crop to be about 1 week ahead of schedule and harvest should begin during the 1st or 2nd week of May. The vine ripe market is flush with supplies and supplies should remain plentiful for at least the next two weeks. Baja crossings have started. Nogales crossings are winding down and sizing has decreased. Demand continues to be rather sluggish. Prices are at or near Suspension Agreement minimums.

Romas

Supplies have increased which has caused FOB prices to fall near or to Suspension Agreement minimums. Nogales is winding down but Baja crossings have increased. Crossings also available in TX. Quality is variable but good quality can be found.

Grapes

Nogales crossings are coming to an end as Baja crossings increase. Overall supplies are up causing lower FOB prices this week. Quality is variable.

Cherries

Supplies continue to extremely tight and most are required to go east to meet demand. We are about 2-3 weeks away from Baja crossings to begin. Quality is generally fair at best.

TREE FRUIT

The market is elevated. Limited quantities of new crop nectarines and peaches are now available; plums will hit the market in mid-May. Quality is good: sugar levels will increase as the season progresses.

WATERMELON

High prices persist, but are starting to inch down. Mexico is the main supply source at this time; production has increased from northern regions. Domestic production will start in Arizona, California, and Florida later this month. Quality is very good: sugar levels range from 10 to 12 Brix.