

# FRESH DIRECTIONS

WEST CREEK FRESH

Weekly Produce Trend Report for Week Ending May 29, 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	Fair	↔
Iceberg Lettuce	Moderate	Good	↑
Romaine Lettuce	Moderate	Good	↑
Romaine Hearts	Moderate	Fair	↔
Cucumbers	Low to Moderate	Good	↔
Green Beans	Moderate to High	Good	↓
Green Bell Peppers	Moderate	Good	↔
Red Bell Peppers	Moderate	Good	↔
Yellow Squash, Zucchini	Low	Good	↔
Broccoli	Moderate	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 to High	Excellent	↓
Parsley (Curly & Italian)	Moderate to High	Excellent	↔
Carrots, Baby Spinach	Moderate	Good	↑
Cauliflower	Extreme	Fair	↑
Celery	Moderate to High	Excellent	↑
Peeled Garlic	Extreme	Good	↔
Green Cabbage	Moderate	Excellent	↔
Green Onions	Low	Good	↓
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, Roma Tomatoes	Moderate	Good	↔
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

Green and Red leaf supplies are light. Green leaf is in an extreme market. Romaine is below average while Romaine hearts are average. Extreme market conditions continue for limes on larger sizes. Poor weather and growing conditions will continue to negatively impact supply and price in the coming days and weeks. The asparagus market has eased up. Most all herbs remain steady and in fairly good supply and quality. The Berry market remains strong. Good weather in Mexico has increased production on Blackberries. Quality and supplies are very good. The Cauliflower market remains extremely tight with average quality and an escalation in price. The fennel market is tight, and we are seeing high prices.

## WASHINGTON APPLES AND PEARS

Demand is fair, and supplies on all varieties are good. Retailers are now looking to promote summer seasonal items, leaving even greater promotional opportunities on apples, especially 88s and larger red delicious any grade. Small size reds are a little easier to obtain as schools are nearing the end of session and buyers are scaling back. Lower grades on Granny Smith are harder to find. Overall quality remains exceptional. Some growers are winding down on Honeycrisp, Pink Ladys, & Cameos 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

Light supplies of chokes expected to continue this week. We are packing mostly 24s and larger. Quality is excellent, prices are steady. Light supplies industry wide.

## ARUGULA

Supplies of both baby and wild arugula are good and readily available. There are some sizing issues, but quality is good.

## ASPARAGUS

The market will start to loosen up this week. We will see more asparagus in the markets from Washington, New Jersey and soon Canada. We should see prices level out this week. Quality will improve but expect jumbos to remain tight through June.

## AVOCADOS

Rain in California along with the end of regular Mexican avocado season is helping to keep pricing high. Values are on 60s and smaller.

## BANANAS

Prices and quality are back to normal.

## BLACKBERRIES

The market is level. California production has begun; volume levels will be reached by mid- June. The Mexican season is starting to wind down, but stocks are adequate. The Georgia season will start in late May. Quality is very good: sugar levels range from 12 to 13 Brix.

## BLUEBERRIES

**WEST COAST:** Recovering from the cooler temps and rain from last week. This, along with the gap in varieties out East and having to load East coast customers out West, will keep the west coast snug today/tomorrow. However, pace is picking up now. Calm before the storm, as we will start to see record numbers come June. South **EAST:** Temperatures in Georgia will be in the upper 80's and low 90's all week. More importantly, overnight temperatures will be 10-15 degrees higher than the previous week, and will keep ripening on track. Precipitation prediction trends point to increased probabilities of rain in Georgia and North Carolina through late May.

## BOK CHOY

Tight supplies, high prices.

## BROCCOLI

Broccoli continues to be very light as the cold weather continues. We have seen cooler than normal temperatures over the past few weeks and growth has been slow and steady as a result. Quality remains very nice throughout all packs. Crowns are well shaped and heavy with a nice dark green color.





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## CANTALOUPE

We have started out of the California desert and will start out of the Arizona desert by this weekend and we will be off to the races. There is still good volumes of offshore fruit coming in but sounds like they should be finishing in the next week. The overall quality of the California fruit has excellent color, sugar and fruit strength. Sugar levels range from 13 to 14 Brix.

## CARROTS

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

## CAULIFLOWER

Supplies will be below average this week on cauliflower in Salinas and Santa Maria. We continue to be 8-10 days ahead of schedule causing a slight decrease in supplies this week; expecting to get in better supplies towards the end of the week. Quality remains strong overall with the majority of 12ct harvested each day.

## CELERY

Active but steady market. Celery is harvesting in Santa Maria and Oxnard. All celery in Salinas has been transferred from either Santa Maria or Oxnard. Quality is nice in both locations.

## CUCUMBERS

**EAST:** Good supplies continue and FOB prices continue to be at low levels. Quality is generally good. Both FL and GA cukes are available.

## EGGPLANT

**EAST:** Supplies are good and FOB pricing of fancy and choice grades generally lower compared to last week. Quality is improving.

## FENNEL/ANISE

Slightly below demand for the week as harvest is scheduled Monday through Thursday with equal production on a daily basis. We are 22 days ahead of schedule with lighter supplies projected the next three weeks. Supplies will be predominately 18's, 24's and 30's throughout the week.

## 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 fluctuating as we have started new crop California and Mexico as well as some Chilean reds still around. The Chilean fruit should be finished by next week and things will settle out on the new crop fruit. The new crop flames have excellent sugar color and condition, but on the smaller side and larger fruit is hard to come by, this will get better each week and we will see larger fruit in the next few weeks. We expect good volume out of both regions and will have fruit out of those region through the first of July and then transition to the Central Valley which will carry us through first of December.

## GREEN BEANS

Availability has improved in the East, with the harvest season in Georgia now underway. Tight supplies continue in California (Coachella), although prices have eased from recent extreme highs.

## GREEN CABBAGE

Most green cabbage production is now in the Salinas area and supplies are now in full seasonal availability. The market is steady, with occasional volume deals for less. Cabbage is being kept very clean by removing any exterior leaf problems.

## GREEN ONIONS

The iced green onion open market has hit bottom due to lighter demand and increased supplies over the past seven days. Iceless green onion demand remains steady with slightly weaker tones on open market pricing. We anticipate the iced market will remain depressed until growers in Mexico region shift into lighter summer plantings in early June.

## HONEYDEW

Market is a bit weak as there is a fair amount of offshore fruit still around as well Mexico and California fruit. The offshore fruit should hopefully clean up by the end of next week and then the market will settle out and we will see more California and Arizona fruit on the market. The overall quality is excellent with good sugar and nice green to cream cast. Sugar levels range from 11 to 13 Brix.

## KALE (GREEN)

Supplies are good. Demand is steady and quality is good. Bunches are averaging 12-14" in length with dark green color.



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## KIWI

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

## LEMONS

Market is very strong and demand exceeds supply on all sizes and grades and expect things to be this way for a while depending on the amount that is imported from Chile and how much Mexico will bring across as well. But we do expect the prices to be at or above what we experienced last year. The overall quality is fair to good, but with our lack of water trees are stressed as well as the fruit which means weaker fruit.

## GREEN LEAF/VARIETY LETTUCE

The market is up. Overall quality remains very good, but issues such as fringe burn, wind burn, and thrip damage are limiting yields.

## ICEBERG LETTUCE

The market is level and supplies are adequate, but cool weather is decreasing head weights.

## ROMAINE LETTUCE

Supplies will be close to average this week and next. There has been some light but occasional fringe burn on some heads of romaine this week. The carton will be 36-37 lbs. Each head is expected to be 10-11" long.

## ROMAINE HEARTS

Overall supplies will be close to average. Demand is good. Quality continues to be good. We are seeing cupping, and a good ratio of green to bleached coloring. Due to the dry conditions throughout the Valley, there is bug pressure in the fields along with a bit of fringe burn. Everything possible is being done to minimize the issues.

## LIMES

The large-size market is elevated, but prices for small fruit are steady. Quality is very good: skins are dark green and flavor is bright.

## MANGOS

Quality is very good now, and it is all coming out of Mexico and loading in Hidalgo, TX. Sizes will be trending more on the larger size with smaller fruit 10ct and up a little shorter. Guatemala is done, so there is no product in Miami anymore.

## NAPA

Improved supplies. Market has stabilized.

## ONIONS

Market is firm and higher. Shortage of supplies has created a demand exceeds situation for the next couple of weeks. Since Texas has been a disaster due to wet weather, pressure has been put on the Imperial Valley of California crop. This has created a huge "demand exceeds" situation which is cleaning up the Imperial Valley crop earlier than normal. Most sheds will be finished packing by early next week. New Mexico and Central Valley of California are expected to begin shipments next week, but supplies will be limited; especially if they are hit with weather. Expect tight supplies and higher than expected pricing for the next couple of weeks.

## ORANGES

Market very strong across the board with excellent demand, we are packing navels and Valencia's with very good demand on late navels, which we are peaking on 56's and 72's and very few 88's and smaller which is keeping things very tight on all sizes and both varieties. Expect to have supplies of navels for another month and then be dependent on Valencia's until we seen some Chilean navels start to arrive around the end of June. The Valencia crop is about 20% lighter than last year so expect prices to keep firm and increase as we go through the summer. The overall quality is fair with good juice content on the Valencia's and some hit and miss dry cell on the navels, but overall strength of the fruit is a little weak. Sugar levels range from 12 to 13 Brix.

## PARSLEY (CURLY, ITALIAN)

Parsley supplies are below average.

## GREEN BELL PEPPER

**EAST:** Good supplies continue as FL and GA continue to harvest. FOB prices continue generally weak on all grades and sizes. Seeing some suntan out of the FL crop.

## JALAPEÑO PEPPER

**EAST:** Market is stable. Quality is generally good.

## RED AND YELLOW PEPPER

Prices are steady. New crop California stocks are becoming plentiful. Baja supplies (into San Diego, California) are sufficient.

## PINEAPPLE

Expect a comparable market until a seasonal supply gap occurs in late June. Small sizes (7- and 8-count fruit) dominate stocks. Sugar levels have increased to 14 to 15 Brix.



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## IDAHO POTATOES

Big potato supply has gotten very tight again this week as prices inch up. The problem is mostly centered around 40's and 50's this week. Although the mostly market has not changed much on 80's and 90's we are seeing sales on these two sizes gain strength. Not much activity in the #2 market as availability is very good.

## RASPBERRIES

Expect a steady market for the next three to four weeks; new crop California supplies are increasing. Mexican stocks will remain on the market through mid-June. Quality is very good: flavor is sweet and texture is tender.

## RED CABBAGE

Red cabbage production this spring is stronger than it has been for many months. Production is steady and yields are above average while weights, color and sizing are very good. The market remains strong.

## SALADS & BLENDS

Last week's rain was minimal and isn't expected to cause any significant quality or shelf-life concerns, but ordering for quick turns is recommended.

## 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 good with some oversizing and half leaves.

## SPINACH (BUNCHED)

Average numbers with continued strong demand this week. The market has come off a bit. The quality remains excellent with dark green color and full bunches. We anticipate good volume for the next two weeks.

## SPRING MIX

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

## GREEN SQUASH

**EAST:** Same as with the yellow squash. Increased volume coming out of several states is causing FOB prices to remain depressed. Quality is good.

## YELLOW SQUASH

**EAST:** Supplies are good from GA, SC. FL has all but finished up. NC will be starting soon. FOB prices remain depressed. Quality is good.

## STRAWBERRIES

The market is a bit lower than last week; demand has weakened. Recent rain had minimal effect on yields; quality is good.

## TOMATOES

### EAST

#### Rounds

Good supplies continue from the Palmetto-Ruskin fields in Central Florida. Demand is weaker. This is causing lower fob prices compared to last week. Quality is good.

#### Romas

Supplies continue to be good and quality is good. Demand is weaker. FOB prices are lower this week on all sizes.

#### Grapes

Supplies continue to be good with weaker demand. Quality is good. Prices are down compared to last week.

#### Cherries

Supplies continue to be relatively tight and FOB prices stronger. Quality is generally good.

## WEST/MEXICO

### Rounds

The supply of vine ripers continue to be strong and should remain strong through mid-June. Nogales crossings continue to decrease while Baja crossings are increasing. Baja quality very good. Prices continue to be at or near Suspension Agreement minimums.

#### Romas

Good supplies continue and FOB prices continue to be near or at Suspension Agreement minimums. Nogales continues to wind down and Baja crossings continue to increase. Crossings also available in TX. Quality is variable depending the source (especially through TX) but good quality can be found.

#### Grape

Nogales crossings are coming to an end with questionable quality as Baja crossings increase. FOB prices are up slightly for quality fruit but remain near Suspension Agreement minimums. Quality is variable.





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## **Cherries**

Market generally steady as far as supply and demand. Quality is improving.

## **TREE FRUIT**

Stone Fruit is now available out of California. Georgia peaches are available. There are good supplies on persimmons, pomegranates and Asian pears.

## **WATERMELON**

Supplies and quality remain excellent. With the holiday around the corner, we will see demand start to increase keeping prices stronger. The bigger issue will be trucks, due to the holiday. We have already seen rates increase by 30 percent this week, and it will remain this way through Memorial Day.