

MARKET

Update



VEGETABLES

Asparagus: The market continues to climb upwards, with lower production coming out of Peru and Mexico with extremely low volume. Look for the market to stay active as we approach the holidays.

Broccoli: Broccoli 14's and crowns will decrease for next week. Supply is still tight. Not recommended to promote at this time.

Cabbage: We are currently loading product in Texas and Georgia. Over the next couple of weeks more growers in Texas will begin to harvest which is projected to bring relief to current high markets.

Cauliflower: Cauliflower market will decrease next week. We are now loading out of Yuma, AZ. Sizing is getting better day by day and the market will reflect this as well. Recommended to promote!

Celery: Sleeved celery market will increase while the celery hearts will remain steady for next week. Supply is still tight as the new growing regions are not producing all of our needs yet. Recom-

mended not to promote.

Cooking Greens: We are now loading in Georgia. Currently supplies are low and markets high as southern growing regions have experienced too much rain causing extra stress on an already high demand time of year.

Corn: Florida is harvesting with markets steady as promotable volume is becoming available. Good quality is being reported with Florida Sweet Corn.

Cucumbers: We are now loading in Nogales, Arizona. Quality has been excellent! Markets have increased slightly with good volume available. Great time to promote!

Green Beans: Markets are increasing. Florida is projecting to have Green Beans, however no promotable volume is expected for the Christmas Holiday.

Green Bell Peppers: We are currently loading in Nogales as they have started with more volume. Markets are currently stable.

Green Onions: Green onion market price will remain steady for next week. Supply is good right now. This item is recommended to promote.

Green/Red Leaf Lettuce: Green leaf and red leaf market will





decrease for next week. Markets will depend on how well romaine is received. Not recommended to promote.

Hard Squash: We are now loading in Nogales, Arizona. Quality is excellent. Acorn and Buttercup markets have increased due to low supply, while Butternut and Spaghetti markets have declined.

Iceberg Lettuce: Iceberg market will increase for next week. Demand for supply has increased over the past week. The demand is still strong and should get weaker over the next week or two. We are still being prorated at loading. We are now loading out of Yuma, AZ. Not recommended to promote.

Mushrooms: The industry expects supplies on bellas and whites to be tight through the end of the year. We are working ahead as much as possible to build inventory and to reduce the impact at store level.

ONIONS:

Pricing on medium-size yellow onions are strengthening due to the increased demand. Supplies of medium-size yellow onions could be tight throughout the rest of the year unless the demand for jumbo-size yellow onions increases. Demand has started to increase with another holiday push underway. As a result, shipments are expected to be strong. Shipping areas in the Pacific Northwest are long on supply and are looking to move as much product as possible. It will be interesting to see what happens in early 2019.

Sweet Onions: We are pulling in new crop NW Heavenly Sweets and new crop Peruvian Sweets. Quality has been good on both.

POTATOES:

Russets: As we draw closer to the upcoming holiday, demand is picking up once again. Although it is not expected to be as busy as Thanksgiving, this will be the last holiday push until Easter. Supplies seem to be adequate in all growing areas West of the Rocky Mountains, growing areas East of the Rockies have not been as lucky when it comes to potato supply levels. Prices will continue to rise in these areas to match the low supply. This might be a very interesting year in the russet potato category.

Reds: Quality red local red potatoes are available and promotable. Ample supplies are expected through April, pending

storage.

Golds: Good availability on Golds from both WI and the Red River Valley (ND/MN). It's a great time of year for Gold Promotions as quality is strong and pricing makes them promotable.

Red, Yellow, Orange Peppers: We are currently loading Mexican product as most Canadian Hot House growers have finished for season. Markets are increasing due to low volume due to cooler than normal weather in growing regions.

Romaine Lettuce: Romaine 24ct and romaine heart market will drop for next week. Supply is good right now, but may take a few weeks for the price to get down to promotable levels.

Snap/Sugar Peas: Snow Peas – Product from Guatemala, excellent quality and market is coming off. Sugar Snap Peas – Better supply with market stabilizing.

Sprouts: Look for a market increase on all sprouts due to increased labor cost. Shallots will become tight, due to the drought in California causing a short crop.

Sweet Potatoes: Pricing will continue to climb due to lack of supply. RDW has great quality sweets from our grower in MS/LA..

Sweet Mini Peppers: Supply is still low but far better than the last month or so. Markets are projected to remain high through the holidays.

Variety Peppers: Weather and transition are forcing markets higher. Look for this trend to continue for the next week or two, as shippers make a full transition.

Zucchini and Yellow Squash: We are currently loading in Nogales, this is where we are seeing the best quality. Markets are lower on Zucchini; however Yellow Squash is higher as currently it is in short supply due to cold weather in Mexican growing regions.

VALUE ADDED

DOLE:

Iceberg: Tight supply through late January and good quality.

Romaine Lettuce: Tight supply and good quality.



Conventional Spring Mix: Tight supply and quality.
Red & Green Leaf Lettuce: Good supply and quality on both.
Conventional Spinach: Tight supplies and good quality.

MANN'S:

Organic Broccoli: Raw Broccoli material is expected to be in short supply again this week. All items with Broccoli could be shorted. Both food service and retail broccoli will be held to averages until supplies get better. 4/32oz has been temporarily discontinued until raw product supplies get better.

EARTHBOUND FARM:

The rains this past week have caused more supply issues. Heavy prorates will continue through the middle of next week.

Romaine Hearts: Supply issues due to rain and cooler weather. Grown in El Centro, Yuma and Mexico.

GREEN GIANT VEG / TAYLOR FARMS SALADS:

Growing areas received field ice and intermittent rain which delayed harvests and led to muddy field conditions which slows down production and limits our daily harvest capacity. All production out of Yuma / Baja will be tight for at least the next few weeks. Cold weather is slowing down growth, and diminished harvest capacity (at least to meet elevated demand) will ensure us a challenging couple of weeks. Obviously we would prefer to go into the Holiday pull in a much better position from a raw and production standpoint than we currently sit.

Chopped Salads: Same situation - oversold on the chop lines especially of romaine based bags that compete for the same line time as the chopped salads.

Broccoli: Limited. More demand related here.

Cauliflower: Limited.

Snap Peas: This is raw material related. Baja received more rain today and harvest was canceled (see attachments). The Snap pea situation was already in trouble, now its going to get worse. The frost they received will set us up for continued shortages; quality will go from bad to not marketable.



FRUIT

Apples: The Washington crop is turning out to be smaller than anticipated. They are saying the total crop will be down about 11% from last year. Local Honeycrisp are finishing up for the season and we will then move back to Washington. We will have local McIntosh apples through the first of the year.

Avocados: The industry has returned to normal supply levels. Market price is stable with promotable volume.

Blackberries: Conventional blackberry supply will begin to down-trend as central Mexico production has passed its peak. The conventional market will slightly increase and overall supply should remain good for next week. Organic supply should remain good and market price will decrease for next week.

Blueberries: Conventional blueberry supply is down-trending. Central Mexico, Argentina, and Peru have passed their peak production. Rain and hail has slowed the start of the Chilean season by approximately two weeks. The conventional market will increase for next week. The transition from 6oz to pints is now expected to occur around the New Year. Organic supply is improving and market price will decrease for next week.

Cantaloupe / Honeydew: Import shippers are now concerned with a virus that has hit the crop. We are now losing more fruit than we initially thought. It is affecting the cantaloupe, MAG melon, and honeydews. This will affect availability for the next 3 weeks of arrivals in to the US as we finish up in Guatemala and transition to Costa Rica. Look for the market to stay extremely tight until the transition into a different region is complete.

CITRUS:

Navels: New Crop Navels are still peaking small. 72ct and larger continue to be tough to come by.

Halos: Halos are promotable, and quality is excellent.

Grapefruit: Texas sizing is also peaking small. 32ct and larger will be hard to come by, however, look for bagged opportunities.

Sumos: Will start around January first.

Sky Valley: The fruit is small. We'll probably start the end of



December. At present there doesn't appear to be much of anything in 72s or larger in this fruit. They are exhibiting high sugar already even though they are as green as grass.

Bloods: Will be available next weekend. The fruit is small.

Minneolas: Should start in mid January. The fruit is mixed as to sizing. Should have a reasonable amount of 80s, with plenty of bag opportunity.

GRAPES:

The grape market is tremendously active with very good movement supported by level pricing and excellent quality fruit. That being said, we certainly can use "all hands on deck" so to speak, as we encourage continued retail promotions on this fine California Grown Grape crop. With this late trending season, the Grape Category has ongoing sales and profit opportunities. Consumers are also receiving a good bargain for their holiday shopping. Grapes are a party and celebration favorite especially for the holidays, be sure to keep large displays well stocked.

Green: The Autumn Kings still leads the way for our green grapes. Size, finish and flavor are all hallmarks of this variety. With reasonably good supplies, the King should carry us through the next couple of weeks. Meanwhile, the Autumn Crisp and Luisco are resting comfortably in the 32° cold storage rooms waiting for their turn at the market. Our QC Team is reporting that these late season grapes will be great for the end of the month and start of the New Year.

Red Seedless: The long running Scarlet Royal is also holding its own. Supplies are thinning, so we will see the transition to Vintage in the near future, although size and color are nearly identical. We have plenty of Vintage to carry us through December and we will leave the Scarlotta resting in the cold storage until needed. Once again, our QC Team is giving the late reds a big thumbs up!

Black: The supply of Autumn Royal and Adora is surprisingly adequate for the next couple of weeks. With the condition remaining sound, these grapes are very good. Keep the Black Seedless orders coming, we can cover your needs.

Kiwi: Great supply and good quality.

Limes: Lime markets are stable, and pricing is promotable.

MANGOES:

Ecuador: Ecuador will be done by the week of 12/10.

Peru: Peru is on strike and did not load any mangoes on the vessels at the end of last week. We will have to see what happens next. Hopefully the strike is resolved soon.

Pears: Supplies are good, and market is steady.

Pineapple: Supplies will be tight through the middle of January. We do not foresee any supply issues.

Raspberries: Conventional raspberry supply will continue to down-trend. Central Mexico production has passed its peak. Market price will increase for next week. Organic supply and market price will hold steady for next week.

Stone Fruit: Limited import peaches and nectarines are becoming available.

Strawberries: Strawberry supply will remain very tight industry-wide for the coming week. California, Mexico and Florida growing regions are experiencing adverse weather conditions that are negatively affecting overall supply. The conventional market will increase for next week. The use of non-standard labels will be necessary for best order fulfillment. Florida and Mexico are both two-to-three weeks away from better volume. Organic supply remains very tight due to the same factors mentioned above. The organic market will hold steady for next week. The use of non-standard organic labels and smaller pack sizes may be necessary for best order fulfillment.

TOMATOES:

Roma: Markets remain steady. Florida continues to increase availability. Mexico is starting to ship more through the Nogales crossing. Quality is very good with projected increased volume in the coming weeks.

Grape/Cherry: We are currently loading in Florida and Mexico. Markets are currently stable.

On the Vine: We are currently loading a mixture of Canadian and Mexican product as Canadian growers are finishing for the season. Markets have increased slightly.

Beefsteak: We are currently loading a mixture of Canadian and Mexican product as Canadian growers are finishing for the sea-



son. Markets are increasing.

WATERMELON:

Markets continue to climb. We are projected to start loading Mexican fruit in Texas in coming days and will see lower markets and freight costs as this becomes available. Florida started shipping with tight availability.

Mini Seedless: Minis are Mexican fruit. Markets are projected to increase as the Southern Mexican growing areas are starting to ship.

ORGANIC

New Items:

49285 - Organic Cara Cara Navel Orange

Organic Asparagus: We have Mexican organic asparagus.

Organic Bagged Radishes: The bagged radishes from Cal-Organic are here again!

Organic Blueberries: Plenty of organic blueberries coming out of Argentina. Talk to your sales rep if you need to set up any promos for the rest of the month.

Organic Cranberries: The dry harvested cranberries from Ruesch Century Farm are here. We will have organic cranberries into the new year!

Organic Grapes: Red grapes are coming out of California for the rest of the month. Next week we will have organic green grapes out of Peru.

Organic Mangoes: We are done with the organic keitt mangos from California and will just have the Ecuadorian tommy atkins mangoes.

Organic Peppers: Organic peppers out of Mexico are seeing severe shortages, especially bagged mini peppers. For bell peppers we will supplement with product from the Netherlands and Israel. We have just a few mini peppers coming in this weekend, but next week things should be looking better.

Organic Potatoes: Local potatoes from Hugh's Gardens are here, with purple potatoes this weekend. We have Wisconsin potatoes from Igl Farm now, too!

Organic Romaine: All organic romaine items are back, with bulk romaine harvested Coachella/Imperial, CA.

Organic Strawberries: EBF has halted the harvest out of California, and next week they will be harvesting Mexican strawberries.