

MARKET

Update



VEGETABLES

Asparagus: As the Mexican season looks to wind down shippers will transition from the 28# pack into the 11# pack to stretch inventory and get through the Easter pull. Washington is projected to start the middle of April in a light way, and Michigan coming on board the beginning of May. Look for Easter to be tight for asparagus due to how late it is this year.

Broccoli: Broccoli 14's will remain decrease and crowns will increase for next week. Supply is good, and the quality has been great upon receiving. Recommended to promote!

Cabbage: We are currently loading product in Texas. Volume and markets are stable.

Cauliflower: Cauliflower market will decrease for next week. The markets are dropping as the cauliflower is sizing up due to some warmer weather. Cauliflower is now loading out of Salinas, CA. Recommended to promote.

Celery: Sleeved celery and celery hearts will increase for next

week. Supply is tight, and the market cost keeps rising. We are being held to averages at loading. The cooler weather is slowing the growth of celery and the rain is limiting harvest time. Recommended not to promote for the next three weeks.

Corn: Florida is producing great quality with excellent availability. Florida Spring 2019 program has been announced. It's a great time to promote!

Cucumbers: We are now loading in Nogales, Arizona. Quality has been excellent! Volume and markets are stable.

Green Beans: Markets are low and stable, with great quality and availability for the coming weeks.

Green Bell Peppers: We are currently loading in Nogales. Markets are currently high but stable. California growers are projected to start harvesting shippable volume mid-April.

Green Onions: Green onion market price will decrease for next week. Supply is tight right now. We are seeing some quality issues due to rain in Mexico. However, quality is getting noticeably better at receiving. Recommended to promote.

Green/Red Leaf Lettuce: Green leaf and red leaf market will decrease for next week. Quality may suffer as we are being warned from all vendors that there may be signs of epidermal peeling from the colder temperatures on all leaf items. Recommended to





promote!

Iceberg Lettuce: Iceberg market will decrease for next week. Quality is fair right now and lettuce is also very tight at loading. Recommended to not promote!

ONIONS:

The onion market has been very active over the last two weeks. Pricing is higher on all varieties and sizes of onions and overall demand has improved. White onions are extremely limited. The reports we've heard is that there are very few whites in that growing region putting more pressure on yellow onions for "in-country" consumption, therefore the reason for the price increases. It is likely that the country will see a gap in white onions—this may be the case until growers from Texas begin shipping white onions. Yellow onion pricing is expecting to continue to strengthen as well.

Sweet Onions: Supplies of Mexican 1015 onions are tight and pricing will remain at current levels until TX and GA start later in April. Preliminary VIDALIA Season update: Acreage is down as compared to last year: This year: approx.. 9,000 acres as compared to 12,000 for last year. The onions are progressing along nicely. The crop looks healthy and robust. The official start date as of now is April 22nd. The Commissioner of Agriculture for the state of Georgia sets the start date each year. The advisory panel (a group of Vidalia growers) will meet this week to discuss changing the start date. If they decide that the onions are maturing faster and will be ready prior to April 22nd, they will advise the Commissioner to change the date. The Commissioner can adhere to the recommendation or decide not to, he has done both in the past. We believe he will change the date. His decision could take up to 2 weeks, hopefully not. More updates as we get closer to the start date.

POTATOES:

Russets: The russet potato market remains steady, some pricing increases on the larger sized russet potatoes. Movement of product from all shipping regions remains slow. The industry is hoping for an uptick in movement for the upcoming Easter holiday. Due to increasing quality issues with the WI russet crop, we've moved from WI russets to Nebraska russets. Quality has been good all season from NE.

Russets (Idaho): The Idaho potato market is steady and quality has been good. Most expect the market to firm up as more russet suppliers east of the Mississippi struggle.

Reds: While suppliers in WI are finishing up, growers in North Dakota are shipping high quality red potatoes and are expected to have red potato supplies through May and possibly June. New crop red B's are now in all branches.

Golds: Growers in the Midwest are clearing out supplies of storage crop yellow potatoes. The remaining supplies of storage crop yellow potatoes are from growers in Colorado, Washington and Idaho. The majority of the new crop yellow potato supply remains in the Southeast, with Florida new crop yellow potatoes available at a considerably higher cost.

Red, Yellow, Orange Peppers: We are currently loading Mexican product. Supply is improving. Canadian growers are also starting in a light way.

Romaine Lettuce: 12/3 romaine hearts will decrease and 24ct romaine market will increase for next week. Supply is tight right now. We are being warned from all vendors that there may be signs of epidermal peeling from the colder temperatures on all leaf items. Recommended to promote!

Snap/Sugar Peas: Snow Pea market is very active with prices escalating and excellent quality. Sugar Snap have excellent quality.

Sweet Mini Peppers: Supplies and markets are stable. Markets are projected to rise slightly in the coming weeks as supply is projected to decline slightly.

Zucchini and Yellow Squash: We are currently loading in Nogales, AZ. Most Mexican growers have transitioned to their northern growing regions. Volume and markets are stable.

VALUE ADDED

DOLE:

Iceberg: Tight supply through transition There's good quality, but some epidermal peel.



Romaine Lettuce: Tight supply through transition. Good quality, but with some blister and peel that will continue through the end of Yuma season.

Red & Green Leaf Lettuce: Good supply and quality on both.

Conventional Spinach: Good supplies and good quality.

Conventional Spring Mix: Good supply and quality.

Butter Lettuce: Tight supply for the next week or two, and good quality.

MANN'S:

Broccolini: Broccolini supplies will be short again this week due to the cold/wet weather. We are hoping to fill to 100% of 6 week averages on the 6/6oz Trays for this week. Weather permitting we are on schedule to be in better supplies next week.

Organic Broccoli: Organic Broccoli supplies could be hit and miss this week due to quality. We are hoping to fill all orders in full this week, but may fall short depending on the quality of the raw material received as the week goes on.

Snap Peas: Snap Pea supplies have tightened up a bit this week. As long as Salinas weather allows and deliveries from Mexico are on time, we should be able to fill all orders in full.

EARTHBOUND FARM:

Mixed Lettuces: All leaf items are forecasted for normal harvest for next week. However, our desert plantings will finish for the season next week & our Salinas Valley plantings are behind schedule. Please anticipate a possible 2-3 week supply gap during this transition period. Leaf market demand is currently steady for all items. Growing Region: El Centro.

Romaine Hearts: Our Huron plantings started this week with excellent supply and quality. The supply outlook going into early April continues to project significant volumes for the next 3 weeks. Market demand is projected to remain steady for next week's orders. Growing Regions: Huron, Yuma & Mexico.



FRUIT

Apples: We are starting to see a slight rise in bag pricing, which is normal for this time of the year. We expect to see our first new crop import apples sometime around the first part of May.

Avocados: Most of the year we can have a decent feel for Mexico's markets. There are always a few times that the industry gets caught off guard. Given the time of year and demands, markets were lower than expected. Instead of taking them up gradually, costs jumped up. With Mexico being the only shipping point at this time, markets are substantially increasing. In addition, with Easter being later and close to Cinco De Mayo we expect supply shortage issues to go along with higher markets.

Blackberries: Conventional blackberry supply is expected to be lighter than originally anticipated for next week. Yields are falling short of projections and road closures in central Mexico are causing transit delays. Market price should increase for next week. Supply is expected to increase mid-April and markets should soften accordingly. Promotional volume and pricing is expected for the later-half of April. Organics should remain in fair supply with market price holding steady for next week.

Blueberries: Conventional blueberry supply will remain light as we move in to next week. Select regions in Mexico are past peak production and down-trending rapidly whereas others are slowly up-trending. California has been slow to up-trend production due to rain and cool weather. Florida is projected to up-trend the later-half of next week. The conventional market will increase slightly for next week. Organic supply will also tighten up due to the same factors mentioned above and market price will increase.

Cantaloupe: Things have tightened up a bit on the cantaloupe front. Shippers are receiving more jumbo processing fruit than the typical retail sizes. Quality has been excellent this year.

CITRUS:

Halos: Halos are now into the new crop tangos, and quality is excellent. We expect to have them available through April.

Grapefruit: Texas sizing is also peaking small. 32ct and larger



will be hard to come by, however, look for bagged opportunities.

Sumos: Now available, fruit is peaking on the smaller side.

Sky Valley: The fruit will be small, and we expect bulk oranges to be limited. We expect to have product through March.

Bloods: Will be available through March.

Minneolas: Will be available through April.

Cara Caras: Will be available through April.

Grapes: Reds are promotable with good quality, look for this to be the case for the next couple of weeks. Greens are going to get very tight as we move forward. Mexico is slated to start at the beginning of May in a very light way. We will see a two-tier program on greens as shippers with storage fruit will be looking to get a premium, while others with questionable fruit will be at lower prices as we move forward.

Honeydew: After a tight start to the year honeydew seem to be more abundant. Quality has been excellent.

Kiwi: Great supply – Green product from Greece, Italy and CA Good quality. California Gold Kiwi available for another 2-3 weeks – Excellent quality!

Limes: Lime markets are leveling out and markets seem to be stable.

Mangoes: Mexican Tommy Atkin supplies are still tight on large mangoes and will remain so through April. Mostly 12ct available. Limited amounts of 10 ct and larger. Guatemalen Mangoes will have volume the week of 4/1 or 4/8. They will be Tommy Atkins.

Pears: We are now into new crop Argentina bartletts. Red pears, bosc pears, and anjous will all continue to be available from Washington.

Pineapple: Supplies will steady for the foreseeable future.

Raspberries: Conventional raspberry supply is expected to be lighter than originally anticipated for next week. Yields are falling short of projections and road closures in central Mexico are causing transit delays. Market price should hold steady. Supply is expected to increase mid-April and markets should soften accord-

ingly. Organics remain very tight and market price on organics should hold high and steady for next week. Alternative labels may be necessary to fill organic orders.

Strawberries: Conventional strawberry supply will be lighter than originally anticipated for next week. Florida has officially finished production for the year. Central Mexico is having a bigger impact on overall volume reductions due to size adjustments driving acres out of production. Rainfall in California this week has delayed the onset of more volume, but should be a minor setback overall. Non-standard labels and organics were sourced to cover conventional demand due to production shortfalls this week. Conventional market price is expected to hold steady for the time being. Oxnard and Santa Maria are still forecasted to up-trend rapidly next week. We expect an active market depending on how much and how fast the volume increases play out. Organic supply should follow a similar trend as conventional. Market price should see a slight increase for next week due to organics being sourced to cover conventional demand.

Stone Fruit: The import season is starting to wind down. Domestic peaches and nectarines are currently projected to start at the end of April. With plums being the middle to end of May.

TOMATOES:

Roma: Markets are low and stable. Quality is very good.

Grape/Cherry: We are currently loading in Florida. Markets have risen slightly with decreased volume and some growers transitioning growing regions.

On the Vine: We are currently loading Mexican, Canadian and USA grown product. Markets are stable.

Beefsteak: We are currently loading Mexican grown product. Volume and markets are stable.

WATERMELON:

Mexico, for the first two weeks of April will be tight and then we will see an increase in volume around mid-April. More acres will be in production for Mid-April. Another gap is projected for late April to the first part of May as winding down in Mexico happens. Markets are higher and inconsistent. Texas will start in a light way around the first of May with volume around mid-May.



Mini Seedless: Markets are stable. Product quality has been very nice with good availability.

ORGANIC

New Items:

Up Next: Gold Nugget Mandarin in a couple weeks and organic Vidalia onions at the end of April

Organic Bell Peppers: Supplies are getting better on peppers and the market will start coming down.

Organic Blueberries: Import blueberries are done. We will have California grown blues early next week.

Organic Broccoli: Broccoli is going to be limited for the next three weeks as they transition to their northern plantings. Growing region: Yuma, Mexica and Salinas Valley.

Organic Cauliflower: Cauliflower is steady right now. However, supplies will be limited towards the later part of March once they transition out of the desert into their northern plantings. Sizing will be between 12 and 16ct to fill orders. Growing region: Imperial Valley, Yuma and Salina Valley.

Organic Celery: Celery is starting to ramp up back to normal supply. We are in good shape on inventory, but demand is still high, so market price is up. Growing region: Mexico.

Organic Citrus: We have lots and lots of organic specialty citrus. bulk tango mandarins, bag organic Cuties, blood oranges, heirloom navel oranges, and mango oranges.

Organic Grapes: Organic seedless grapes are done for the season, until Mexico starts up in May.

Organic Greens: Organic greens are now grown and loading out of Lamont, California.

Organic Mangoes: We have Mexican Tommy Atkins.

Organic Pomegranates: California is done with bulk pomegranates for the season, so we will be out until next fall. Import

pomegranate arils are here.

Organic Potatoes: Hugh's Garden has a much larger than expected harvest of organic red potatoes and would like to set up some specials. Talk to your sales rep and let's get something going. IGL farms is just about to the end of the reds and russets. Maybe only 1 week left with those.

Organic Romaine: Bulk romaine harvested out of Lamont, CA.

Organic Strawberries: We have a steady supply of Mexican strawberries from EBF.

Organic Turnips: Done for the season until next fall.