

MARKET TRENDS

WEEK ENDING MARCH 22, 2019



PERFORMANCE
FOODSERVICE



Produce

Market Overview

We are quickly approaching transition; most growers will start transition towards the end of March, and we expect to be fully transitioned by the end of April. Celery is still in a very EXTREME situation. We have seen improvements in most West Coast veg commodities. Strawberries have also improved.

WATCH LIST

- Mushrooms
- Sweet Potatoes and Yams
- Tomatoes (Rounds and Romas)

Apples & Pears

The market is stable. Golden Delicious and Granny Smith supplies are in strong demand; prices are higher for these varieties. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix. The Pear market is stable. D'Anjou Pears are on the market, as are packer label Bosc stocks. Sugar levels range from 12 to 14 Brix. California Bartletts will become available in June.

Artichokes

Supply industry-wide is fair. Demand is fair and prices are steady to higher.

Arugula

Supply is steady-fair and we may start to see some mildew.

Asparagus

Low prices persist; stocks are plentiful in the Mexican growing regions. Quality ranges from good to excellent: spears are straight and firm with grassy flavor.

Avocados

Markets are steady on all sizes. Mexico is trying to take the prices up slowly in the lead up to Cinco. Demand appears to be fairly good and supplies are good as well. All sizes are steady, as bigger fruit has cleaned up at the border and is starting to get a little stronger. There continues to be plenty of #2 fruit being picked and that should continue for the foreseeable future. Many retailers are looking to promote avocados to go along with March Madness. California is going to try to start picking over the next few weeks.

Bananas

According to our team in the tropics, the issues we have been experiencing are coming to an end. We are expecting good grade, excellent quality and back to normal supplies.

Beans

EAST: Round beans are readily obtainable with excellent quality available.

MARKET ALERT

- **Bell Pepper (Green, Red & Yellow) - EXTREME**
- **Cabbage (Red/Green) - ESCALATED**
- **Carrots (Jumbo) - ESCALATED**
- **Cauliflower - ESCALATED**
- **Celery - EXTREME**
- **Limes - ESCALATED**
- **Onions (White) - EXTREME**



MARKET TRENDS

WEEK ENDING MARCH 22, 2019



PERFORMANCE
FOODSERVICE



Produce *(continued)*

Berries:

Blackberries

Prices are stable. The Mexican crop is past its peak; stocks are starting to diminish. Quality is good: berries are deeply colored, juicy, and sweet. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is weak; Mexican and offshore production continues to increase. The California season will get a slow start this week. Overall quality is average: berries are dark blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market is steady at high levels; supplies are tight but increasing. Quality is good: berries are plump and juicy with sweet flavor. Sugar levels range from 13 to 14 Brix.

Strawberries

Prices are elevated. Supplies are tight in California due to weeks of cold, wet weather. The Florida season will wind down over the next three weeks. Most Mexican suppliers have ended production for the season. Quality is good: bleeding and bruising are problems.

Bok Choy

Supply 50lb is short, but 30lb is good. Quality is good.

Broccoli

Prices are elevated; stocks are limited. Quality has remained very good despite inclement weather: discoloration and mildew are slight issues in Arizona.

Brussels Sprouts

Cool weather in the desert and Mexico is slowing down production and the market is up from last week. Prices are rising and may continue to rise into next week.

Cantaloupe

Offshore fruit to the west has increased and we have good supplies, and heavier volumes landing on the east coast. The overall quality has been good with a firm green to straw cast and sugars have been much better on this weeks and last week's arrivals. There are good supplies of 9's, 12's and a few 15's. We expect continued good volumes going forward and quality should hold good as well.

Carrots

ESCALATED Jumbos are still escalated, but we are seeing improvements.

Cauliflower

Prices are high; stocks are limited. Quality has fallen: riceyness and uneven texture are industry issues.

Celery

The market is elevated; expect tight stocks through May. The Salinas Valley is on schedule to begin production in early June; supplies will become more plentiful at that time. Quality is fair.

Cilantro

Quality is fair due to recent rain.

Corn

Steady supply and good quality out of Florida and Mexico.

Cucumbers

EAST: Honduras imports are winding down quickly. Eastern availability will be light for the next few weeks until Florida's spring crop comes to the table in the next 2-3 weeks. FOBs are feeling pressure to move up and quality is still good.

WEST: Warmer temps are starting to bring on the crops.

Baja is expected to start in the next 5-7 days further helping increase supply. FOBs remain a little high for now but are expected to see relief in the next 7-10 days as the pipeline fills back up. Quality is good to excellent.

English Cucumbers

Supply has improved through Nogales.



MARKET TRENDS

WEEK ENDING MARCH 22, 2019



PERFORMANCE
FOODSERVICE



Produce *(continued)*

Eggplant

EAST: Florida's supply is light but will start to increase over the next 3 weeks. FOBs are mostly steady. Quality is fair to good. WEST: Good volume is available with FOBs steady. Quality has slipped just a bit but is still good.

Fennel

Supply on fennel will be short for the next few weeks due to frost damage and the Yuma season finishing with light supply. We will continue to see a majority of smaller fennel this week - 18s and 24s will remain limited.

Garlic

Supply is firming up and markets are active.

Ginger

Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Costa Rica and Honduras and Peru with no major quality issues being reported.

Grapes

We are getting better volumes on the east versus the west and we have received 50% less volume than normal to date, volumes are down due to some of the early varieties in Chile have been pulled out and new varieties planted but production not at full capacity this year. The Chilean volumes have started to increase this week. The overall quality has been good to fair, greens are tighter than reds and you will see some minor discoloration in the greens.

Green Cabbage

ESCALATED Due to the cold weather, there will be lighter supply for the next two weeks.

Red Cabbage

ESCALATED Supply continues to be light.

Green Onions

Supply, quality and demand are all good.

Honeydew

Starting to see better supply we are going out of Mexico with very light volumes and fruit is extremely tight and limited there are some 8's available and hoping to see more crossing from Mexico next week. The Offshore Honeydew are also suffering from a white fly problem and volumes are lighter than normal and also the fruit quality has been rough with spotting and also weaker fruit due to the white fly problem. We will keep you posted going forward and hope things start to get better.

Jicama

Markets remain firm due to ongoing short supply and will continue to see some quality and shelf life issues.

Kale (green)

Supply has increased a bit.

Lemons

We have finished our Dist. 3 (Desert) crop and going with heaviest volume here out of Dist. 1 (Central Valley) and will start to pick some Dist. 2 (Coastal Regions) fruit in the coming weeks and just primarily size picking to relieve the trees of some stress. We will also have disruptions on harvesting in Dist. 1 and 2 as the rains are going to blanket the state through Friday. We will also keep you posted on when we will be getting back in to pick next week. The moisture has also been creating spores in the fields as well and we will hope that it is not too extensive on the clear rot. Again, we are blessed to have the moisture, we will get through it one way or another.

Lettuce:

Butter

Supply is good. Quality is fair.

Green Leaf

Supply is normal. There is slight peel, blister, and tip burn present. Lighter weights will be an issue over the next week or two.

Red Leaf

Supply is good. Quality is fair.



MARKET TRENDS

WEEK ENDING MARCH 22, 2019



PERFORMANCE
FOODSERVICE



Produce *(continued)*

Iceberg Lettuce

Lettuce supply continues to be lower than anticipated. Weights are lower and there has been some irregular sizing. Quality is slightly better, but there still continues to be some frost damage. The market has started to lower as a result of less demand back East due to weather-related issues.

Romaine

Supply is fair and demand has been very strong. Warmer temperatures are predicted for the weekend. We anticipate the market staying fairly steady. Epidermal peel and blister are still present, but quality is improving.

Romaine Hearts

Supply and quality are fair due to weather-related issues.

Limes

The market is elevated; stocks are tight. Quality is good: stylar is a concern.

Napa

We will have limited supplies of the 50lb, but we have good supplies of 30lb. Quality is fair.

Onions

White Onions: EXTREME White onions are extreme as supply is very limited. Idaho/Oregon is finishing up and Mexico is crossing in limited supply.

Onions have increased rapidly over the last 5 days as storage reports indicated lower stock on hand than expected.

Additionally, Mexico is very short supplied and keeping the majority of their crop within Mexico. Texas is 3-4 weeks away from starting domestic supply, and their crop is also short by about 25-30%. It is likely we will see this market remain volatile for the next 6-8 weeks until summer onions really ramp up in May.

Oranges

More rain started yesterday and is forecasted to rain heavy through tomorrow. Clear through weekend and another storm starting Tuesday of next week, also forecasting for later today hail and thunderstorms which could play havoc on tree fruit. We are experiencing some clear rot and also puff and crease in most blocks showing up and will continue to get worse once our weather warms up, just lots of moisture in the ground. The overall color is full, and the fruit is eating good, and will only get better once the sun comes out as the water does leach out some of the sugar. We will keep you posted first of next week as to our outlook of getting in to harvest. We will hopefully be able to make it through first of next week with what we have in the house now. We sure need the moisture, but it does cause some problems and interruptions, but we will get through it.

Parsley(Curly, Italian)

Quality is fair due to recent rain. We are expecting supplies to be steady.

Green Bell Pepper

EAST: Older fields in FL have played out, leaving mostly new spring crops for this week. Current sizing is running small with little big fruit available. Look for volume to rebound over the next few weeks as more spring crops come on board. FOBs are up with good to excellent quality available from new fields. WEST: Two new growing areas are tapping in the game, but volume and size have been slow to come. Look for better yields over the next 7 days. Quality has been a bit rocky and is fair to good.



MARKET TRENDS

WEEK ENDING MARCH 22, 2019



PERFORMANCE
FOODSERVICE



Produce *(continued)*

Jalapeños (Chiles)

EAST: Florida has seen a slight uptick in volume this week as a few growers begin harvesting new crops in South Florida. Volume will remain light until Plant City is up and running in a month or so. Most of the east will continue to look west to fill demand. FOBs are steady with good quality available.

WEST: Although some new growers have come on board, we tend to see a much stronger demand this time of year which generally puts upward pressure on chiles. FOBs are currently steady with good to excellent quality available from new fields. Be cautious of older crops as those have seen some troubles.

Red & Yellow Bell Pepper

The market has escalated. Low temperatures have drastically decreased supplies. There is a wide range of quality on the market: bruising, decay, and premature breakdown are industry-wide issues.



Pineapple

Prices are low. Supplies are ample, especially 7- and 8-count sizes. Quality is very good.

Idaho Potatoes

The Potato market has increased demand with very limited availability on all large cartons. Pricing continues to rise each week on cartons while the consumer market has been steady. The size profile remains on the smaller side. Much of the Norkotah crop is winding down and many growers are moving to Burbanks with higher pricing.

Radishes

Markets are firming up due to heavy precipitation and wind damage to fields. We see FOB pricing ticking up this week.

Salad Blends

The market is inching down. Iceberg and romaine stocks are adequate. Inspectors are closely monitoring finished cartons for chunks and core material to achieve the best quality packs.

Snow and Sugar Snap Peas

Quality is good, and supply has increased.

Spinach (Bunched)

We are seeing some mechanical damage; however, quality is fair.

Spinach (Baby)

Supply is good. There could be some quality issues, due to cold weather.

Spring Mix

Prices have stabilized; volume is sufficient. Quality is fair: mildew and discoloration are reported issues near the end of shelf-life.

Yellow Squash/Zucchini

EAST: Spring squash crops are starting up in South Florida. Volumes are improving daily and adequate to meet demand. Look for volume to remain steady for a while. FOBs are starting to decrease, and quality is finally improving (knock on wood it stays!).

WEST: Although it's been tough out west the last few weeks, warmer weather and new crops in the north are slowly bringing back the numbers. FOBs are starting to decrease. Quality is still a bit shaking but expected to improve in the next 7-10 days.

MARKET TRENDS

WEEK ENDING MARCH 22, 2019



PERFORMANCE
FOODSERVICE



Produce *(continued)*

TOMATOES – EAST

Rounds

Florida's round tomato volume is about the same as last week's – adequate but somewhat lighter than a month ago. Similar numbers are expected for the next 2-3 weeks as farms transition from final Winter plantings into Spring crops. The size profile is fairly spread out, but higher demand on the 6x6 size has made them a bit on the short side. FOBs are up significantly as Mexico runs short as well. Quality is mostly good, but there is some subpar product coming from older fields.

Romas

Florida farms are a little shy on Romas this week. Look for production to pick up closer to April 1. FOBs are up with mostly good quality available.

Grapes

Transition is a little smoother for grapes. Yields are off a bit in Florida, but not much. However, with Mexico's transition struggling in the last few days, this is putting pressure on FL to perform. FOBs are up slightly, and quality is good to excellent.

Cherries

Yields are still a little light but there is enough to meet demand. We could see a shift in availability as more western growers pull from the east due to lack of quality in the west. Currently, FOBs are steady week over week with good to excellent quality available.

TOMATOES – WEST/MEXICO

Rounds

Like Florida, Mexico's round crops are in a slight lull as growers wait for new plantings to begin later this month and into early April. Between vine ripens and mature greens, most sizes are available but jumbos are on the short side. FOBs are pushing up a few dollars to account for the lower volume in both FL and MX. Quality is mostly good, but fruit can be tender.

Romas

West Mexico's crops are a little behind due to recent cool weather and crop transitions, but we anticipate better volume around April 1. FOBs are up to account for the lack of supply in both FL & MX. Quality is good to excellent.

Grapes

Volume has slipped off as crops transition from winter to spring. FOBs are starting to move upward by the day. Look for the crop to rebound in the next 2 weeks. Quality is good to excellent.

Cherries

Fairly good volume continues to cross daily. FOBs are steady; however, quality continues to be a struggle, with fruit poor to fair at best. We recommend keeping your inventory snug until quality improves.

Watermelons

Prices are steady to slightly lower than last week; Mexican and offshore supplies are adequate. Overall quality is good: sugar levels are average for this time of year.

