



ORGANIC OUTLOOK

DECEMBER 8 - DECEMBER 15, 2017



WWW.FSPRODUCE.COM 12/2 LB

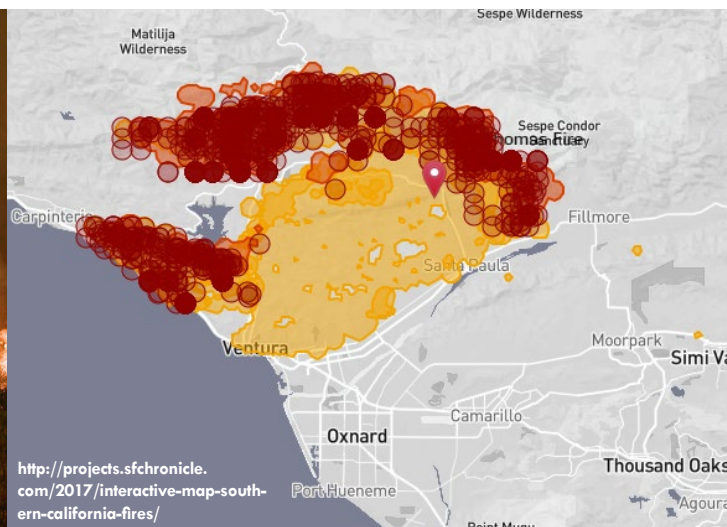
WILDFIRES IN CALIFORNIA DISRUPT & DESTROY

Fast-moving and destructive wildfires in California have destroyed homes and businesses, and have disrupted the supply chain in nearby growing regions. Some roads, including the 101, have closed, blocking truck traffic and preventing workers from making it to the packing houses and fields.

Strawberries, celery, cauliflower, and other fresh produce commodities grown in Oxnard, CA, have been difficult to get to. Growers are struggling to transport product to their cooling sheds.

This has shifted most of the demand to Yuma, Arizona or Mexico growing regions.

Limoneria and Calavo, both Ventura-based produce companies, have had structures damaged. There may be some avocado and lemon groves destroyed in the wake of the fires.



OG CA CITRUS

Organic Clementines have arrived in good supply. Expect these to be in season from California into January. 2lb pouches and 25lb bulk packs are available.

Organic Satsuma Mandarins continue in steady supply. Stem & Leaf packs are also in season.

Organic Cara Cara Navel Oranges (pink flesh) are expected here in early/mid-December. Prices will be firm out of the gate.

Organic Navel Oranges continue in better supply with good flavor and improving color. Prices continue to come down.

Organic Pummelos are available and are expected to continue through December.



OG TOMATOES

ALERT! Organic 2-Layer and 15lb Hothouse Tomatoes are in very tight supply from Mexico. Supplies out of Canada are nonexistent at this time, but might be available for mid-December. Pricing is very high.

ALERT! Organic Roma Tomatoes are in very tight supply out of Mexico.

Organic Cluster Tomatoes are in reasonable supply out of Mexico.

Organic Grape Tomatoes are in decent volume out of Mexico. Product out of Florida is more limited and price is higher.

Organic Cherry Tomatoes are in light supply out of Florida this time. It will be until late December before stronger volumes are available. **Organic Rainbow Cherry Tomatoes** are limited for mid-December. Stronger volumes won't be available until late December.



OG BERRIES

Driscoll's **Organic Blueberries** are steady this week with very high pricing. South American **Organic Blueberry** supplies have tightened slightly, but better supplies are expected to ramp up towards the end of December and in to January.

Driscoll's **Organic Blackberries** and **Raspberries** are firmer this week with prices on the rise. Other brands of **Organic Blackberries** continue to be steady.

ALERT! Organic Strawberry volume is extremely limited with very high prices. Expect supply gaps.

Organic Cranberries continue out of Canada in limited supply and might just make it to Christmas.



OG BROCCOLI

Organic Broccoli is increasing in supply out of CA and AZ. The market is flooded and deals are available! Some shippers for backed up and have quality issues. Southern California has started with **Organic Broccoli** harvests as well this week.

Organic Broccoli Crowns are in good supply.



OG SQUASH

Mexico has abundant supplies of **Organic Zucchini, Yellow, and Sunburst Squash**, all at promotable prices.

Organic Zucchini will become more limited this week out of Florida as colder temperatures are expected. **Organic Yellow Squash** is out from Lady Moon Farms.



OG GREEN BEANS

Florida growers are harvesting their first **Organic Red and Green Cabbage** of the season.

Organic Cabbage is all but done on the east coast.

CA reports adequate supplies of **Organic Red, Green, and Napa Cabbage**.



OG GRAPES

ALERT! **Organic Red Grape** prices have all tightened up significantly and are expected to finish later in December. Quality is weak.

CA **Organic Green Grapes** are extremely limited and will run out later in December.

New crop Peruvian **Organic Grapes** are expected to begin in late December but with a much smaller crop than last year. Prices should remain very high.



OG LETTUCES

Florida shippers report good supplies of **Organic Red Butter, Green Butter, Red Leaf, Green Leaf, and Romaine Lettuces**. Quality is excellent, especially from Lady Moon Farms. CA also has good supply of all varieties, but brown discoloration is present on the ribs.

Organic Romaine Heart quality continues to be very good. Pricing is steady.



OG CAULIFLOWER & ROMANESCO

Organic Cauliflower and Romanesco is in abundant supply out of CA.

While the price of **Organic Cauliflower** is attractive, it's still a few dollars higher than last week. Most shippers are experiencing aphid and discoloration issues.



OG MANGOS

Organic Mangos (Tommy Atkins variety) from Ecuador are in great supply through the end of the year. Supplies will tighten towards the end of the month. Peru will be the next growing with fruit. That will start as early as the 2nd week of January.



OG GRAPEFRUIT

California **Organic Grapefruit** are in excellent supply in all sizes and bags. Quality remains excellent and prices continue to come down.



OG CUCUMBERS

Organic Cucumbers are in abundant supply from Mexico. Florida is gapping for a few weeks.

Organic Hothouse Cucumbers are in good supply out of Mexico. **Organic Mini Persian Cucumbers** will be available for mid-December.



OG ASPARAGUS

Organic Asparagus is in steady supply this week out of Mexico. Quality has been good. Expect stronger volumes to begin in mid-January.



OG APPLES

The following premium variety apples are in peak season for December and January promotion: **Organic Lady Alice, Opal, Piñata, Kiku, Kanzi, Envoy, and Jazz Apples.**

Washington **Organic Braeburn, Cameo, Fuji, Gala, Golden, Granny Smith, Honeycrisp, Jonagold, and Pink Lady Apples** are in excellent supply in both bulk and bags. Some aggressive bag promotions are available!



OG PEARS

Organic Anjou, Red Anjou, and Bosc Pears are in firmer supply this week with prices continuing to creep up.

Organic Comice and Concorde Pears continue in decent supply.



OG PEPPERS

Israel is now the main supplier of **Organic Peppers**. Quality continues to be very good.

Supplies are limited on **Organic Colored Peppers** this week out of Mexico.

FL, NC, and Mexico growers have good supply of **Organic Green Peppers**.

Organic Jalapeño Peppers are in good supply out of Mexico and Florida.



OG CARROTS

Organic Carrot and Rainbow Carrot supplies have recovered and more are now available out of California.

Organic Table, Juice, and Jumbo Carrots are back in adequate supply.

Organic Cello Carrots have dropped in price, but don't expect price changes on **25lb Organic Carrots**. Expect no price.



OG HASS AVOCADOS

Organic Hass Avocados are in good supply for mid-December. Beyond that, Mexico continues to try to cast uncertainty with delaying harvesting and unpredictable harvest schedules. It is expected to tighten up a bit through the end of the year.

Organic Fair Trade 60ct Hass Avocados will be a little tight this week but 48ct should be in good supplies.

OTHER STORIES:

- **Organic Celery** is in good supply out of Mexico and California and quality has improved somewhat. **Organic Celery Hearts** are also in good supply out of CA. **Organic Celery Root (Celeriac)** is in good supply from CA.

- **Organic Brussels Sprouts** are expected to be in limited supply out of CA, but Mexico will start soon.

- CA **Organic Green Beans** are in limited supply. Mexico shippers report abundant supplies and very good quality. Organic Florida Beans are more limited.

- Quality of **Organic Pineapples** has been excellent and suppliers continue to look to promote volume in December.

- Mexican **Organic Honeydew** have arrived with limited availability, and will wrap up in late December or early January.

- **Organic Eggplant** is in adequate supply out of Mexico. Florida shippers report limited supplies for mid-December.

- **Organic Spinach** is in better supply this week out of CA. Quality is reported to be very good.

- **Organic Kale** is in abundant supply out of CA and FL. **Organic Green, Lacinato, and Red Kale** all have good quality.

- Supplies and quality have improved on **Organic Formosa Papayas**.

- **Organic Lemon and Meyer Lemon** supplies are excellent out of California. Prices are coming off.

The 12 Produce Merchandising Tips of the Holidays

CHRISTMAS DAY 2017: MONDAY, DECEMBER 25

HANUKKAH: SUNDOWN TUESDAY, DECEMBER 12

NEW YEAR'S DAY 2018: MONDAY, JANUARY 1

The **Christmas** and **Hanukkah** holidays are filled with ethnic, religious and cultural traditions that influence your customers' food choices. Understand the preferences of your shoppers? Know your customers and the cultural make-up of the neighborhoods near your store. This will aid you in creating merchandising and sales opportunities by catering to their individual needs through fresh produce variety, displays and special offerings, as well as inspiring meal or party ideas.

Use this checklist of suggestions and tips to help you plan so you can please your customers and set sales records in your produce department this **Christmas** and **Hanukkah** season.

1. NUT & DRIED FRUIT DISPLAYS

Nut & Dried Fruit Displays should include: In-shell and Shelled Nuts, Raisins, Dates, Medjool Dates, Chestnuts, Dried Figs, String Figs, Nut trays and a variety of Pistachio packs. Ask your rep about the brands and programs we offer on organic and conventional.

SMART TIP: Take a good look at your inventory on glazed fruit and holiday shipper displays around **December 11th** to make sure that you have it all out on the sales floor. Consider reducing the retail so you don't carry it over past the holiday. Turn your cash over and start out fresh next year.

2. FRUIT BASKETS & PARTY TRAYS

These are a **MUST** during the holidays for those hosting parties or going to gatherings! Utilize Four Season's fruit basket pre-order program to grow your incremental sales for the holidays. Use our selection of pre-made styles to complement your store-made baskets. Four Seasons will offer pre-made Fruit and Vegetable Trays available throughout the holiday period.

Check with your sales representative about delivery for the holidays. Our pre-made fruit and vegetable trays are convenient, gain extra impulsive sales and require no additional labor from your produce department. These will certainly boost your sales through the holiday period.

3. EASY-PEEL MANDARINS

Easy-peel Mandarins, for snacking and giving, continue to become more popular around the holidays. Offer Clementine and Satsuma Mandarins in gift boxes, 3lb bag Halos and Satsuma Mandarins, and even in loose displays by the pound.



4. CONVENIENCE PRODUCTS SAVE HOSTS TIME

Cored Pineapples, Cubed Butternut, Microwave Green Beans, Pomegranate Arils, cut vegetable bags, Vegetable Spiral Noodles and pre-ordered fresh cut fruits and vegetables will sell well all month, especially right before Christmas and New Year's Day. Are you prepared to have these incremental sellers in stock? Don't forget the Fresh Salsa!

5. DECEMBER HOLIDAYS ARE HISTORICALLY MORE FRUIT FOCUSED

It's more fruit focused than Thanksgiving, which has a bigger vegetable focus. Expand fruit variety with Coconuts, Kiwifruit, Persimmons, Pomegranates, Mangos, Papayas, Melons, varietal Pears, all fresh Berries, Organic Golden Berries, Pineapples, Clementines, Satsuma Mandarins, Pummelos, and other fresh Citrus. Now will be a good time to try some of our Organic Buck specialty citrus varieties.



6. HERBS & STUFFING INGREDIENTS

Herb & Stuffing ingredients sell well but not as much as at Thanksgiving as more different meats are cooked for the holiday feast. Pay attention to parsley, rosemary, thyme, sage, poultry blend and celery and hearts.

7. TRADITIONAL HANUKKAH INGREDIENTS

Honey, Sweet Potatoes (Yams), Soup Mix (root vegetables), Walnuts, Raisins, Onions, Parsnips, Apples, Oranges, Tangerines, Potatoes for Latkes, Falafel, Donuts, Chocolate Candy (Gelt) (**December 12 - 20**)



8. HIGHLIGHT GREAT CHRISTMAS & NEW YEARS MOVERS

Green Beans, Broccoli, Cauliflower, Brussels Sprouts (both loose and on the stalk to create excitement in your veg displays), Asparagus, Fresh Cranberries, Green Cabbage, Cole Slaw Mixes, Yukon or Red Potatoes and Pearl and Boiler onions are popular holiday dinner side dishes.

9. CATER TO THE DIY VEGGIE TRAY MAKERS

Specifically with: Celery & Carrot Sticks, Baby Carrots, Broccoli Crowns, Cauliflower Florets, all colored peppers – red, yellow & orange, radishes, broccoli, cauliflower, celery, sliced and whole white mushrooms, grape & cherry tomatoes, scallions, cucumbers, green & yellow squash, avocados and asparagus. Dips or dressings like Marzetti's or Marie's are big sellers.

10. ETHNIC SPECIALTIES

Mediterranean: Anise, Artichokes, Broccoli Rabe, Savoy Cabbage, Escarole, Endive, Long Hot Peppers, Red Peppers, Green & White Asparagus

Eastern European: fresh Dill, Parsley Root, Horseradish Red Cabbage, Celery Root, Beets, Leeks

Latin: Cilantro, Tomatillo, Batata, Yuca, Eddoes, Yautia, Plantains, Calabaza, Avocados, Chayote, Meridol Papaya, Butternut and Acorn Squash, varietal Eggplant

Southern Cooking: Collards, Kale, Black-eyed Peas, Sweet Potatoes



11. ORDER & DISPLAY PLANNING TIPS

- Key Christmas Displays should be in place by **December 16th** to maximize sales and profits and to keep your labor force as efficient as possible.
- Bring in your tonnage and items on your deliveries **December 18-19**.
- Stay Ahead on your "hard goods" like potatoes, onions and dips. Your shrink risk is minimal, but if you are out of product and waiting for deliveries you are going to miss sales and disappoint customers.
- Keep bananas with good yellow color on display – these are great in fruit salads! Stay ahead with color.
- Beginning on the Monday prior to Christmas and Hanukkah, every day will be busy and you'll want to capture as many sales as you can.

12. SMART LABOR PLANNING

- Develop an off-hour or evening fill schedule for your "hard goods" like salad dressings & dips, salsa, guacamole, humus, and croutons, juices and jarred fruits, dried fruits, fruit mixes, snacks, in-shell and shelled nuts, potatoes and onions
- Daytime labor should be focused on fruit, vegetable, salad displays and engaging your customers.
- We expect heavy volume pulls on **12/21-12/23**. You don't want to be waiting on items those days that could have been brought in earlier.

Four Seasons Produce Christmas & New Years Schedule

Monday 12/25 – Merry Christmas! Offices are closed for the holiday. No deliveries.

Tuesday 12/26 - Sunday (12/31) – Normal delivery and office schedule.

Monday 1/1 – Happy New Year! Offices are closed for the holiday. No deliveries.

Wednesday 1/3 - Extra deliveries will be made in most regions.





CONVENTIONAL OUTLOOK

DECEMBER 8 - DECEMBER 15, 2017



WWW.FSPRODUCE.COM 56 CT

CALIFORNIA ORANGES OUTLOOK



As we approach the heart of **Navel Orange** season, we are seeing the peak sizes on the 72 counts and larger. The fruit as well is very clean and producing little choice-grade fruit.

With less choice fruit available, more small-sized fancy grade Navels will be packed for 4 lb bags. Expect higher prices on bags than other years.

A good note is there will be 48ct and larger to promote in an 8-lb. bag or bulk loose bins.

VARIETAL OUTLOOK:

Cara Cara Navel Oranges (pink flesh) are now in season. **Blood Oranges** and **Minneola Tangelos** are slated to be available in late December.



CV HASS AVOCADOS

Sporadic harvesting of **Hass Avocados** in Mexico continues. The start/stop method that Mexico has adopted over the past 20 months will likely impact **Avocado** supplies nationwide.

ALERT! Prices are on their way back up. For mid-December it is not extreme, but the promo pricing is gone. Stay tuned.

We are continuing to see a shift in the size curve toward 48's and 40's, with smaller fruit gaining strength in the market due to reduced availability and a larger influx of #2 fruit.



CV TOMATOES

ALERT! **Vine Ripe** and **Roma Tomatoes** are extremely short supply. Pricing is at one of the highest levels so far this year with harvests so limited. Mexico and Florida just don't have the supplies to keep up with demand. Florida is struggling from the effects of Irma months ago, and Mexico has had much cooler than usual weather in the growing areas.

ALERT! **Hothouse Beef** and **Cluster Tomatoes** are also becoming tighter this week and pricing is beginning to move upward. As **Round** and **Roma Tomatoes** become tight, buyers began to switch into **Beef** and **Clusters** as a substitute, causing pressure on this market.

Grape and **Cherry Tomatoes** are showing signs of going up in price as well. Quality has been very nice on all Florida product.



CV PEPPERS

Green Peppers are in much better supply again this week, and pricing will continue to slide.

Florida has had beautiful quality on all **Green Peppers**, and sizing has been mostly extra-large (40-45ct). Mexico has begun harvesting, but supplies are still limited. Sizing on this first pick is more toward the jumbo size.

Hothouse **Colored Peppers** have become tighter this week, and pricing is beginning to move upwards.

Mexico isn't having the harvest they expected for this week, which is causing less supply to be in the market. **Yellow** and **Orange Pepper** are much more limited than **Red**.



CV CUCUMBERS

Now is the time to promote! **Cucumbers** are still in excellent supply out of Mexico. We will have excellent supplies and promotable pricing on all **Supers** and **Euro Cucumbers**.



CV EGGPLANT

Eggplant volume has really increased during early December out of Mexico, and pricing is lower.

We'll have mostly 24ct, and quality has been very nice for this early season **Eggplant**. Promote!



CV STRAWBERRIES

ALERT! Florida will have some cold weather over the weekend, slowing production down for a few days. They should get back to normal by mid-December. Look for prices to remain pricier through the next few weeks as we approach Christmas.

Mexican **Strawberry** production will remain steady this week.



CV BLUEBERRIES

Blueberry prices and supplies will hold steady this week. Chilean vessels are headed to Philadelphia area ports, and should arrive before Christmas.



CV CAULIFLOWER

Cauliflower prices will be higher this week. Wild-fires in CA have caused all demand to the desert. Supplies will be more limited due to the northern regions ending faster than expected.



CV LETTUCE

Continue to promote all **Lettuce** and **Leaf** items! Pricing will remain on the lower side and good supplies will continue through much of December.



CV CABBAGE

We've now transitioned back to Georgia for new crop **Cabbage**. Counts are expected to be in the 14/16 range, and quality will be excellent.

Cabbage from the northeast is beginning to show cold damage on the wrapper leaves, so it's time to transition south.



CV GREEN BEANS

Green Beans are in excellent supply out of both Florida and Mexico, but we've continued to source out of Florida because of excellent quality. This is the perfect time to promote **Green Beans**!



CV MELONS

Cantaloupe and **Honeydew** are expected to be in steady supply this week out of Guatemala.



CV SQUASH

Both **Zucchini** and **Yellow Squash** are in fair supply out of Mexico. Cold weather is slowing harvests for mid-December.



CV CHERRIES

Cherries are in season from Chile. Right now, the fruit is arriving by air-freight, but prices are expected to drop when boat shipments come in around Christmas.



CV BROCCOLI

Broccoli and **Broccoli Crown** supplies and prices will remain steady and promotable this week.



CV GRAPES

Since California shippers have struggled to maintain their ideal **Grape** movement, we expect there to be some side deals on iffy quality product.

It is hard to imagine that the end of this crop year will be anything but sloppy, especially more so on the “**Autumn King**” **Green Seedless** than **Red Seedless Grapes**.

If quality holds out, we should have plenty of California **Grapes** through Christmas. **Red Globe Grapes** are all but finished and **Black Seedless Grapes** appear to be winding down quickly.



CV MANDARINS

California **Clementines** continue in steady supply, but there's little flex on pricing from the big brands like Halos.

5-lb. and 3-lb. **Clementines** from Spain and Morocco are the deal. With strong demand on California fruit, most importers will be aggressively priced through the end of December on their fruit to lure business in their direction.

California **Satsuma Mandarins** remain in peak season through Christmas.



CV PREMIUM APPLES

With the big push winding down on **Eastern Apples**, many retailers are beginning to turn their focus to premium variety fruit promotions for December through February.

Here are some of the best to promote:

- **Envy**
- **Jazz**
- **Lady Alice**
- **Pacific Rose**
- **Piñata**
- **NY Snap Dragon** (through 12/31)
- **NY Ruby Frost** (available 1/3)



CV KIWIFRUIT

Green Kiwifruit is in season from CA and Italy.

SunGold Kiwifruit is also in season from Italy and available in the US for its first winter selling season.



CV MANGOS

Mangos are in promotable supply and pricing out of Ecuador. 10 ct Tommy Atkins variety fruit is the most abundant for December.



CV GRAPEFRUIT

Grapefruit from Texas is now in peak season. Flavor will improve each month through February. The Rio Star variety has been cutting deep red and is heavy with juice.

3lb & 5lb bags, 27sz bulk bins, and 27/36/40ct fancy cartons are all promotable.