



ORGANIC OUTLOOK

APRIL 20 - APRIL 27, 2018



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ORGANIC SWEET BABY BROCCOLI & ORGANIC BROCCOLI

Organic Sweet Baby Broccoli will be in great supply for late April and early May as growers have hit a flush in product. Pricing is promotable and quality has been outstanding!

More **Organic Broccoli** volume is available this week. Pricing is reasonable. Some regions still have discoloration issues, other areas have nice appearance.

Organic Broccoli Crowns are in better supply.



OG BLACKBERRIES & RASPBERRIES

Organic Raspberry prices have elevated due to rain and cooler weather. Expect this to last going into May with sporadic arrivals.

Driscoll's Organic Blackberry supplies have unexpectedly become extremely limited due to the rain and cool weather. Supplies are not expected to improve for a few weeks.

Other brands of **Organic Blackberries** continue in tighter supply out of Mexico than usual this time of year.



OG BLUEBERRIES & STRAWBERRIES

Organic Strawberry supply out of all regions is sporadic due to unexpected weather. Volumes are expected to improve going into May.

California **Organic Blueberry** supplies are somewhat limited this week due to heavy rains and cooler weather. Pints and 6 oz will be available for the end of April. Supplies out of Mexico and California are expected to improve over the next few weeks. Prices are higher this week.

Driscoll's **Organic Blueberries** have experienced a pretty heavy weather-related loss and supplies are estimated to be 25% down. May should be an excellent time to promote.



OG TOMATOES

Organic Cherry, Rainbow Cherry, and Grape Tomatoes are in good supply out of Florida. Pricing is steady. **Organic Grape Tomatoes** from Mexico are in abundant supply, with cheap prices.

15lb Organic Hothouse Tomatoes out of Mexico are in adequate supply. **2-Layer Organic Tomatoes** out of Mexico will not be available until early May.

Organic Cluster Tomatoes are increasing in supply and prices are beginning to drop. Expect more volume to come on.

Organic Roma Tomatoes are available from Mexico and prices are lower, but quality has been fair at best.



OG APPLES

New crop **Organic Gala Apples** continue in excellent supply out of Chile and Argentina. There's a really good priced advantage on this fresh crop.

Washington **Organic Fuji, Gala, Granny Smith, Lady Alice, Pacific Rose, and Delicious Apple** prices continue to firm as the end of the season comes to a close and shippers are finishing up.

Washington **Organic Honeycrisp, Piñata, and Pink Lady Apples** are extremely limited with high prices on all sizes.



OG KALE

Organic Kale supplies out of Florida are increasing this week. Quality from Lady Moon Farms remains excellent. They're starting their Georgia new crop **Organic Kales** in late April too.

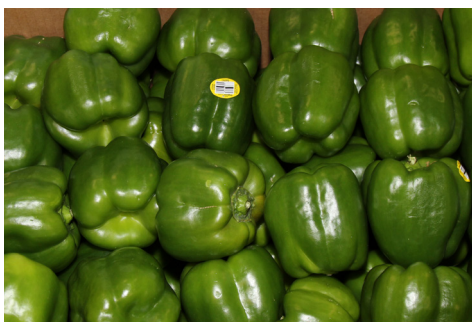
Organic Kale is in tighter supply out of CA this week. Prices have moved up on all varieties.



OG RHUBARB

Organic Rhubarb is now in good supply out of Oregon and Washington. The quality of the northwest **Organic Rhubarb** is spectacular. This season should last through mid-May, weather dependent.

We will have some local **Organic Rhubarb** in mid-May, but the quality will not be as strong.



OG PEPPERS

Holland is fully supplied on **Organic Colored Bell Peppers**. Mexico growers report limited supplies on all **Organic Color Bell Peppers**. Quality is good, with a few arrival issues noted.

FL has finished up its **Organic Green Pepper** harvests for the season. Mexico has very limited supplies of **Organic Green Peppers**. **Hothouse Organic Green Peppers** with better quality are available from Canada in 11lb packs.



OG CAULIFLOWER

Organic Cauliflower markets are all over the board. Quality varies by shipper and by day. Overall, it appears to be a tight market, although some shippers have come off in price.

Organic Romanesco is in limited supply.



OG LETTUCE

Organic Lettuce out of Georgia will begin the last week of April from Lady Moon Farms.

CA growers report good supplies of all **Organic Lettuces**, but quality is not as nice as GA. Some occasional rib rust/downy mildew is present.

Organic Romaine Heart prices are stable for now, but better supplies and quality will be apparent for late April.



OG MANGOS

Organic Ataulfo (Honey) Mangos from Mexico remain in steady supply and pricing. This is the best time of the year to promote this golden variety.

Shippers of **Organic Tommy Atkins Mangos** from Mexico adjusted their forecasts slightly on volume going forward into the end of April and May. Rain and quality issues in Mexico have affected volume and pricing will likely creep up just a bit. Big sizes are best for promotion in late April.



OG CUCUMBERS

Organic Cucumbers are in better supply out of Mexico. Pricing is down a bit. Florida growers are reporting low yields on their new plantings of **Organic Cucumbers**.

Organic Hothouse Cucumbers are in abundant supply out of Mexico.



OG GRAPES

South African **Organic Red and Black Seedless Grapes** are still available and are expected to finish up in early May. New crop Mexican **Organic Grapes** arrive later in May.

Peruvian **Organic Red Grapes** have made a quick unexpected return in very limited supply until early May.



OG HASS AVOCADOS

Organic Hass Avocados from Mexico and California are in good supply for late April. Pricing has been up over the past week, especially on California fruit. Heading into the Cinco de Mayo holiday, pricing should be fairly steady.

Fair Trade Organic Hass Avocados are in a seasonal gap



OG MELONS

Organic Cantaloupes are coming into season from Mexico for the end of April.

Organic Watermelons - both whole seedless and mini seedless - are now in season from Mexico.



OG ASPARAGUS

Organic Asparagus supplies are tighter for late April. Mexico is reporting some quality issues, but CA product remains strong.

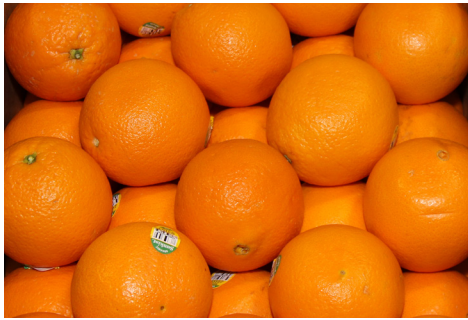


OG POTATOES

New crop **Organic Red** and **Yellow Potatoes** out of CA will begin this week, but priced will almost double that of the old crop product we are getting out of Canada. Because of this, we plan to stick with Canada while supplies last and quality remains nice before we cut over to CA.

We will see a one-week gap in supply of both the 1.5 lb. **Organic Honey Gold** and **Medley Potatoes** from Tasteful Selections.

Organic Baby Mix Sweet Potato trays are now done for the season and will return in the fall.



OG CA CITRUS

Organic Navel Oranges are becoming increasingly limited with prices on the rise. An early end to the season is expected in early May.

New crop **Organic Valencia Oranges** are available and in good supply. Expect a price advantage over navel oranges.

Organic Minneola Tangelos, Golden Nuggets, and **Murcott Mandarins** have been affected by rain and cooler weather. Expect sporadic gaps and higher prices until the season ends.

Organic Kumquats and **Blood Oranges** are expected to finish for the season by the end of April.



OG ONIONS

ALERT! The outlook on **Organic Red Onions** continues to be a challenging one due to quality. Availability is EXTREMELY tight and the price will be high if we can get anything. Reports coming out of the field, following rainy weather, have been that harvest has been further delayed on new crop reds.

There will be some supply gaps until Southern California starts in May.

UPDATE:

We will see our first arrival of **Organic Sweet Vidalia Onions** in the door towards the last week of April.

OTHER STORIES:

- **ALERT!** After a quick flush on **Organic Zucchini** for mid-April, supplies are much lower headed into May. Prices are up and availability is spotty until new production comes on.

- **ALERT!** **Organic Spinach** is much more limited in supply this week. Transition between growing regions has a lot to do with the limited supply this week. Prices are up.

- The **Organic Celery** market and quality are all over the board. Some shippers report insects and blight. Other shippers have clean product. **Organic Celery Hearts** are in tighter supply this week with higher prices.

- **Organic Pineapple** supplies are steady and quality has been very nice! Excellent deals are available on large sized fruit.

- **ALERT!** **Organic Lime** supplies have tightened significantly due to the cold and rain with prices skyrocketing. Smaller fruit should be expected.

- **ALERT!** California **Organic Lemon** supplies continue to dwindle and prices are on the rise due to the rain.

- **Organic Snow** and **Snap Peas** are now in season.



Four Seasons Produce will once again be donating to PASA (**Pennsylvania Association for Sustainable Agriculture**)!

A portion of every case of organic produce & dairy products sold through **Earth Week April 15 - April 21** will be donated to PASA.

EARTH WEEK DONATION PARTICIPANTS:



For more information on PASA, check out their website www.pasafarming.org and follow Four Seasons on social for fun & informational posts!

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If your store would like to consider other ways to contribute & participate in this event, contact Lauren Smith at PASA:

Lauren Smith

Director of Development
Pennsylvania Association for Sustainable Agriculture (PASA)
Millheim, Centre County, Pennsylvania
(814) 349-9856, ext. 22





FOUR SEASONS FAMILY OF COMPANIES SUSTAINABILITY INITIATIVES - 2018

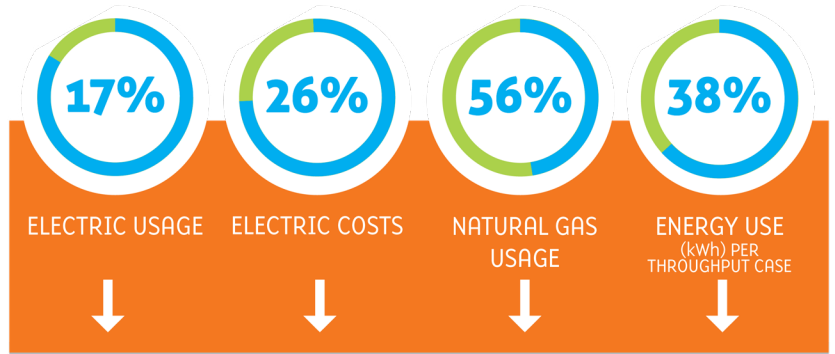
ENERGY PROJECTS

ELECTRICITY & NATURAL GAS



- Lighting retrofits to LED now covering 100% of our facility inside and out
- Dock Envelope Improvements
- Energy (peak load) mgmt program
- PACE Controls (improving compressor efficiency)
- Demand response participation
- Day Lighting
- High efficiency & VFD Motor Upgrades
- HVAC Upgrades
- Completed a Strategic Energy Management Plan in 2012.

ENERGY PERCENTAGE REDUCTIONS DURING PEAK 12-MONTH PERIOD



5.4 MILLION POUNDS

of waste recycled or produced into energy in 2017

OVER \$3 MILLION

of avoided landfill costs since YR 2000

80% REDUCTION

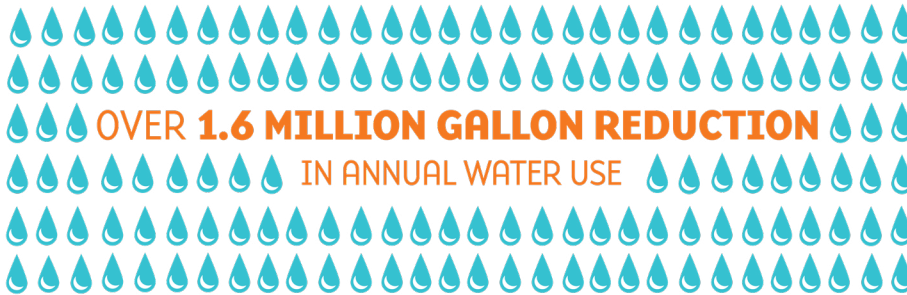
in waste per throughput case from our peak 12-month period



- ✓ On-board computer technology to improve MPG
- ✓ Driver incentive & training to reduce truck idling time
- ✓ Equipment enhancements & driver education to reduce miles & improve fleet performance

24%

reduction from peak use in 2007



COMPANY-WIDE "MIXED-STREAM" RECYCLING PROGRAM



CURRENTLY INSTALLING A 1.3MW SOLAR ARRAY AT THE WABASH RD FACILITY



ON-SITE ELECTRIC CAR CHARGER PLUG-INS FOR ASSOCIATES & CUSTOMERS

ACHIEVEMENTS & AWARDS

- **First warehouse** in the country to be awarded the **ENERGY STAR**
- **"Ethics in Business" Award** by Lancaster Chamber of Commerce
- Featured in **DC Velocity** & summer **High Performing Buildings** magazines

• **Green Plus Certified** - 2013 Green Plus Sustainable Enterprise Award

• **2017:** First facility to achieve the 50001 Ready designation from the U.S. Department of Energy

• **2018:** Recognition from PPL Electric Utilities Excellence in Energy Efficiency Program to be a Gold Level Energy Efficient Business.





CONVENTIONAL OUTLOOK

APRIL 20 - APRIL 27, 2018

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SPRING CROP CAULIFLOWER



Consumer demand remains strong for **Cauliflower!**

Spring crop **Cauliflower** is now in season from Santa Maria and Salinas, CA. **White Cauliflower** is available in steady volume at reasonable pricing.

Colored Cauliflower - purple, orange, green - is promotable for late April and May. These varieties add exciting color to displays.

Sharp retailers are also including **Purple, Orange, and Green Cauliflower** in their prepared foods recipes and salad bars for a trendy, seasonal appeal.



CV SWEET CORN

Sweet Corn will remain in excellent supply this week out of Florida. Looking forward, growers are expecting uninterrupted supplies right on through to the Memorial Day holiday on all varieties.

Once again, this year growers planted the majority of the crop towards **Bi-Color Sweet Corn**.



CV PEPPERS

Green Peppers are extremely promotable right now out of Florida. We will have plenty of Jumbo and XLG Peppers all week. Quality has been excellent. We will also have lots of opportunities on Jumbo Santan Peppers as well.

Elongated Red Peppers from Mexico are in much tighter supply this week as we transition into domestically grown pepper. Mexico finished a little earlier than expected and California is right around the corner from harvesting.



CV BERRIES

Look for steady **Strawberry** supplies and pricing for late April and May. Things seem to have stabilized on the **Strawberry** front. We expect prices to firm up heading into Mother's Day.

Fresh crop Florida and Mexican **Blueberry** production continues to increase. With increased harvest volume, 12/1 pint containers will become promotable. Pricing will be down slightly this week.



CV BROCCOLI

Eastern & Western **Broccoli Crown** supplies are steady and prices are promotable.

Andy Boy **Broccoli Rabe** remains promotable for late April.



CV SWEET POTATOES

There are VERY sharp deals on North Carolina **Sweet Potatoes** in all sizes. Quality is outstanding!



CV CUCUMBERS

Cucumbers are in much tighter supply this week out of Florida. We will also have supplies out of Mexico to help bridge the gap, but overall pricing will begin to climb.



CV GREEN BEANS

Green Beans are in tighter supply this week out of Florida. Quality continues to be excellent, but pricing will begin to climb.



CV SQUASH

Zucchini and **Yellow Squash** are much more limited this week out of both Mexico and Florida. This shortage should be short-lived, but look for pricing to climb here in late April. Quality has been very nice on all Mexican product.



CV HASS AVOCADOS

Last week's **Hass Avocado** arrivals to the US hit a season high out of Mexico. Volumes are anticipated to continue at these levels as the market prepares for Cinco de Mayo.



CV CABBAGE

Cabbage growers are beginning to transition to Georgia. The heat in Florida is beginning to take a toll on the overall crop, so we'll be sourcing from our growers in Georgia for better quality.



CV WATERMELONS

Mexico and Florida **Watermelon** volumes are continuing to increase. Demand has been off, especially in the northeast, due to the cool weather.

Look for lower pricing from growers as they try to spark some more demand. Quality and flavor have been great.



CV ASPARAGUS

The Mexican **Asparagus** volumes have wrapped up for the season. California and Peru will be the sources of supply this week.

Look for prices to increase headed into May as overall supply levels drop.



CV RUSSET POTATOES

Large sized **Count Russet Potatoes** will see a slight increase in price this week, especially the 70ct size as the sizing profile this week is peaking to small potatoes.



CV MANGOS

Small-sized **Tommy Atkins Mangos** (12 ct) are in abundant supply from Mexico and Guatemala at low prices. Early May will be an excellent time to promote **Mangos**. Larger sizes are also promotable but at slightly higher price points.

Ataulfo (Honey) Mangos remain in peak season for spring sales and are becoming more and more popular.



CV GRAPES

The price range and quality of **Green Seedless Grapes** is far and wide, but true storage fruit is worth the price. Prices will continue to increase to stretch the season to meet the Mexican start date.

Crimson Red Grapes continue to arrive in very good shape. We will see a few more shipments coming to the east coast, mostly of **Crimsons** and **Red Globes**.



CV ONIONS

We will have our first arrival of **Vidalia Onions** for the week of April 23. This should be some of the first product out of the state! This is an AWE-SOME item to promote! Supply will be good and quality is expected to be great.

The storage **Onion** season is winding down, while growing areas like Texas, Southern California, and Georgia are beginning to ship new crop **Onions**. We have, and likely will continue, to pull fresh **Onions** out of TX for the time being until California **Onions** get fully under way.



CV TOMATOES

Tomatoes are extremely promotable again this week across the board!

We will have lots of inventory on all **2-Layer, Roma, Grape, Cherry, and Specialty Tomatoes** all week. Quality from Mexico, Florida, and Canada has been beautiful.

