

MARKET NEWS ORGANIC OUTLOOK



FLORIDA ORGANIC GREENS & LETTUCE OUTLOOK



With heavy frosts and cold weather starting to settle into parts of the mid-Atlantic and Northeast, **Local Organic Greens and Veggies** are beginning to wind down. So, what's next?

Lady Moon Farms has started harvesting limited quantities of **Organic Greens** in Florida and numbers will begin to ramp up as their season continues. Expect to see items such as **Organic Chards, Kales, Collards, Dandelions, and Baby Bok Choy** in the second week of November.

Organic Greens are seeing steady supplies and pricing from California.

Organic Leaf Lettuces from California remain limited in volume and expensive in early November. Expect California to be the main source until Lady Moon Farms in Florida begins harvesting in mid-November.

Organic Romaine Hearts, on the other hand, are in decent supply with very nice quality for early November.



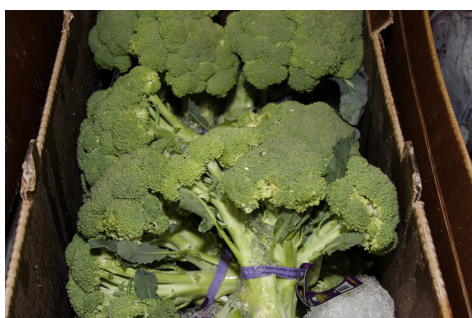
OG BERRIES

Driscoll's **Organic Blueberries** are in steady supply out of California and Mexico with excellent bloom, size, and flavor. Other brands of **Organic Blueberries** out of Argentina, Peru, and Chile are good with nice quality and reasonable pricing.

ALERT! Driscoll's **Organic Blackberries** out of California and Mexico continue in extremely firm supply. Heavy prorates should be expected with prices continuing to rise. Other brands out of Mexico have begun, but heavy rains will have an impact on supplies and quality for the next couple of weeks.

Organic Raspberries from Driscoll's are in lighter than expected supply for mid-November. There are other brands available at lower pricing, but the outlook on those appear shaky.

ALERT! **Organic Strawberries** continue in light supply with elevated pricing and shorter shelf-life. Florida is starting in a very small way.



OG BROCCOLI

ALERT! **Organic Broccoli** from California continues to be limited in supply during early November at high pricing.

Less than ideal weather conditions in some regions, combined with shippers winding down and preparing to transition to new growing regions, has caused the shortage in demand. With limited supplies and the extra demand from some shippers being out of product, prices have continued to climb.

Supplies for late November and Thanksgiving may improve as some shippers are more optimistic new fields will be in harvest.

Organic Sweet Baby Broccoli supplies are improving, allowing for better promotability.

Organic Broccoli Rabe is also in decent supply.



OG CAULIFLOWER

ALERT! **Organic Cauliflower** from California continues to see limited supplies and is not improving for early to mid-November.

Quality is decent, but there's just no volume, that's why pricing has gone up so sharply.

Most of November will see uncertainty for **Organic Cauliflower** as product will remain limited and many shippers are working on a week-to-week basis on pricing.

Organic Romanesco will be available in limited quantities during November.



OG BRUSSELS SPROUTS

Organic Brussels Sprouts from Mexico continue to see excellent supplies and promotable pricing. Also expect to see sporadic supplies from Wisconsin and New York at a slightly elevated price.

Organic Brussels Sprouts should be a nice item to promote for Thanksgiving.



OG SQUASH

Organic Green and Yellow Squash from Lady Moon Farms has continued to see steady supplies and excellent quality from their Florida operation in early November.

Mexican **Organic Zucchini** and **Yellow Squash** have begun to see stronger number in early November and will be available at a price advantage.



OG GREEN BEANS

Organic Green Beans continue to see steady supplies from California, Mexico, and Georgia in early November.

Georgia product has been a little hit-or-miss on quality. Florida is expected to be ramped up in time for Thanksgiving.

Organic Green Beans are looking to be a favorable item to promote for Thanksgiving.



OG PEARS

Washington **Organic Anjou, Bartlett, Bosc, Concorde, and Red Pears** are in excellent supply!



OG FALL FRUIT

Organic Pomegranates and **Arils** continue in peak season. **Organic Fuyu and Hachiya Persimmons** are in peak season with excellent quality. **Organic Cranberries** out of Canada continue in steady supply in 6 oz bags and 22lb. bulk.



OG MUSHROOMS

NEW ITEM! Mother Earth Mushrooms, in Landenberg, PA, is now shipping a new 6/4oz **Organic Mushroom Medley** pack, featuring Sliced Shiitake and Crimini, plus colorful Yellow Oysters.



OG PEPPERS

Organic Green Peppers from Lady Moon Farms in Florida are excellent quality, have steady availability, and promotional opportunities are available in the early part of November.

Organic Colored Bell Peppers from Holland and Canada are coming to a close in early November. Although these seasons are coming to an end, the Israeli and Mexican **Organic Colored Bell Pepper** season is beginning in early to mid-November.



OG CUCUMBERS

Organic Cucumbers from Mexico continue to be in excellent supply for promotions through mid-November at attractive prices.

Organic Cucumbers from Lady Moon Florida have seen a little bit of a gap as supplies were limited, however mid-November should see much improved supplies and continued stellar quality.

Organic Mini Cucumbers have begun to be sourced from Mexico and Canada. Expect to see steady supplies and price decreases in early to mid-November as the Mexican **Organic Mini Cucumbers** provide a price advantage.



OG CELERY

Organic Celery had seen a surge in availability, as well as much improved quality as November began. Early to mid-November will see this trend continue and pricing to see a slight price drop to the point where store will be able to take advantage of the lower prices and promote.

Late November and early December remains uncertain for volume, quality, and pricing. Stay tuned.



OG MANGOS

New crop **Organic Mangos** will get started this week out of Ecuador for the week of 11/11. Pricing should be reasonable on 10ct and 12ct with both Tommy Atkins and Haden varieties.



OG ASPARAGUS

Organic Asparagus remains very promotable this week. Quality has been excellent out of Mexico, so continue to promote with confidence. Prices should remain promotable heading into Thanksgiving. This will be a great item to offer.



OG FENNEL

Organic Fennel looks to have promotable opportunities in early November. Take advantage of this seasonal vegetable as the weather is beginning to change.



OG APPLES IN SEASON

PEAK SEASON VARIETIES:

- OG Ambrosia
- OG Braeburn
- OG Fuji
- OG Gala
- OG Golden Delicious
- OG Granny Smith
- OG Honeycrisp
- OG Jonagold
- OG Pink Lady
- OG Red Delicious

PREMIUM VARIETIES:

- OG Autumn Glory
- OG Envoy
- OG Jazz
- OG Kanzi
- OG Lady Alice
- OG Opal
- OG Pinata
- OG Rosalynn
- OG SugarBee

HEIRLOOM ORCHARDS (OREGON):

- OG Ashmead's Kernel
- OG Calville Blanc
- OG Grimes Golden (ending)
- OG King David



OG TOMATOES

Organic Beefsteak and **Cluster Tomato** prices continue to go up this week. Demand continues to be strong since field grown vine ripe tomatoes are unavailable.

Organic Grape Tomatoes continue to be very promotable for November. Quality has been excellent all around. We also have new crop Florida product from our premium grower, Lady Moon Farms.

ALERT! **Organic Heirloom Tomatoes** will be in a gap until mid-December or so. Local is now finished for the season, and Mexico is still a few weeks out of harvests.

ALERT! **Organic Roma** and **Vine Ripe Tomatoes** will be limited or completely unavailable as we are transitioning from local production to Florida and Mexico. Expect shortages and out-of-stocks until supplies improve later in November.



OG CITRUS

Organic Satsuma Mandarins are starting up for the week of 11/11!

California **Organic Grapefruit** supplies are just not ramped up to expected volumes yet, and what is available is mostly small sizing. We plan to source from Texas later in November to add to availability.

Organic Lemons out of California and Mexico continue to improve in quality, supplies, and pricing.

ALERT! California **Organic Navel Oranges** are gapping here in early November due to harvest delays from the high winds that fueled wildfires. The season will begin to ramp up for the week of 11/18.

Organic Limes supplies have leveled out again and are expected to stay steady.



OG EGGPLANT

Organic Eggplant from Lady Moon Farms in Florida is in full swing in November. Expect to see stellar quality and steady supplies throughout the month of November.



OG GRAPES

California **Organic Black, Green, and Red Grapes** continue to go up in price as volumes wind down towards the end of the season. The good news is that quality has been outstanding on the Air Chief Organics.



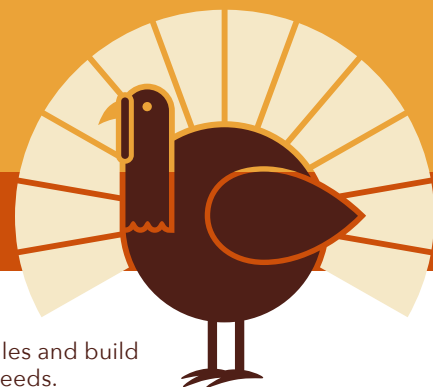
OG MELONS

Organic Mini Seedless Watermelons are coming back into season from Mexico.

NOTE: **Organic Cantaloupes** and **Honeydews** are expensive and declining in volume here at the end of the season.

2019 THANKSGIVING PRODUCE CHECKLIST & MERCHANDISING TIPS

Thanksgiving is Thursday, November 28th, 2019. **PLAN NOW** while there's still the luxury of time!



As a retailer, you want to help your shoppers create that special meal event for Thanksgiving - this is a big deal for them as family and friends are coming. To do that, you need to anticipate what ingredients they'll be using, when they'll need them, and how much they'll need. Do this well and you'll create big sales and build goodwill with your shoppers that can help them make you their choice for all of their holiday shopping needs.

As a buyer or manager, Thanksgiving is all about **maximizing sales and profits** by building massive, fresh and seasonal, and holiday related displays. Some of these displays can stay up through Christmas. Let's get to planning! Be creative in order to encourage impulse sales and maximize profits. Based on our experience, your customers will put a lot of effort into making sure that their Thanksgiving holiday dinner is perfect. Even consumers that "shop around" most of the year prefer to buy all of their ingredients from one store for major cooking holidays.

10 TIPS & REMINDERS TO HELP YOU ACE THIS UPCOMING THANKSGIVING SALES PERIOD!

1 Nut and Baking Displays should be built no later than November 13th! In fact, many chain stores have their set and ready to go the week of Halloween. Nuts are not just for baking, they're good sellers as healthy, high energy snacking.

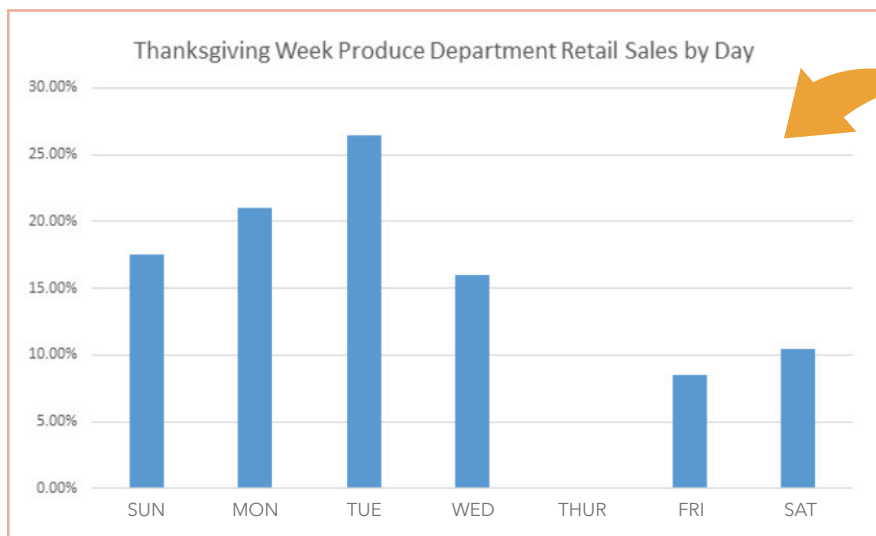
What to Include: *In-shell* and *Shelled Mixed Nuts* and *Walnuts, Raisins, Dried Cranberries, Baking Dates, Medjool Dates, Fresh Chestnuts* and *Roasted/Peeled Chestnuts*, and *Dried Figs*. Pistachios and Almond displays for snacking can be included.

Refill: Initial *California shelled* and *in-shell nut* orders have already shipped. Re-order early so you can stay ahead as product sells down. Few things are worse than having a department full of customers, yet empty bins right before the holiday. Nuts and baking products will sell well through New Year's.



2 Convenience and Recipe-Ready Products save time for stressed-out hosts and sell well the week before Thanksgiving. Offer ready-to-use products that are washed and trimmed, peeled and cut, or in a microwavable package.

- *Trimmed & Washed Microwaveable Green Beans*
- *Season & Steam Microwaveable Brussels Sprouts*
- *Peeled* and *Cubed Butternut Squash*
- *Organic Bagged Cut Vegetables & Veg Trays*
- *Bagged Cut Vegetables & Veg Trays*
- *Fresh Cut Vegetables* and *Fruits & Trays* - available by preorder to help you stay in stock
- *Stuffing Mix (Diced Onion & Celery with Herbs)* - huge mover and available by preorder



PRO TIP:

Plan your ordering with this sales at retail curve in mind.

To be in stock for the Sunday, Monday, Tuesday rushes, you need to have product ordered and delivered 24-48 hours ahead of these peak days.



3 Build a Big Sweet Potato Display to capture Big Sales!

Promote the full variety of **Sweet Potatoes (Yams)** with some aggressive pricing too!

TIP #1: In areas where “sweet potato pie” is popular, jumbo sweet potatoes are ideal.

TIP #2: Post a full case price.

TIP #3: Add **3lb Bagged Sweet Potatoes** for November.

TIP #4: Purple is hot! Add **Stokes Purple Sweet Potatoes** for consumers that want a conversation-sparking side dish.



4 Potatoes & Onions - the staples matter. This is the time of year to build large displays of **bagged** and **loose Potatoes & Onions, Shallots, and Garlic.**

- The best varieties for **MASHING** include: **Yellow/Yukon Gold, White potatoes, Red Skin** (for skin-on recipes) and **Idaho russets** (for fluffy texture).

- Fingerling Potato varieties and Baby Potatoes are ideal for **ROASTING** and don't need to be peeled.

5 Classic Thanksgiving ingredients for holiday side dishes drive sales. Be ready with:

Traditional Veg - Green Beans are a favorite! **Broccoli, Asparagus, Brussels Sprouts, and Cauliflower** are in peak demand.

Did you know? Thanksgiving week sales are often higher than at any other week of the year for:

White Mushrooms, Fresh Cranberries, Brussels Sprouts, Rutabagas, Parsley, Fresh Herbs (including poultry blend), Leeks, Baby Peeled & Whole Carrots, Green Beans, and White Pearl & Cipollini Onions.



6 Be ready with Fresh Herbs!

Pre-book your FRESH HERBS. Don't wait and be disappointed the day before Thanksgiving when you can get more in. **Poultry Mix, Thyme, Rosemary, Sage, and Chives** will be the top 5 fastest moving herb packs for Thanksgiving.

7 Pay attention to Stuffing and Filling ingredients. Think about the items your customers add to Stuffing, Filling, and to their Turkey:

- **Celery or Celery Hearts and Yellow Onions or Sweet Onions** are on almost everyone's shopping list. Be ready and fresh!
- **Chestnuts, Bunched Parsley, Mushrooms, Sage, Apples, and Cranberries** are key stuffing ingredients in many recipes.

8 Greens Sell! **Collards, Kale, Mustard, Turnip Greens** are extremely important for many ethnic and vegetarian holiday dinners.

TIP #1: Get pre-books in for **Washed & Chopped Collards** and **Kale** bags.

TIP #2: Get pre-books in for **bunched Collards** and **Kale** at stores where that is a in-demand traditional side dish.

TIP #3: Post a case price for **Collards** where appropriate.



9 “Whoops, I forgot these sell so well for Thanksgiving!” Some items just move surprisingly well around Thanksgiving. Be ready on:

• **Artichokes and Fennel (Anise), Cabbage, Parsnips, Rutabagas, Cole Slaw mixes, Bananas** with a good yellow color are a “MUST” on display, **Fresh Apple Ciders, Pomegranates and Pomegranate Arils, Persimmons and Grapes, Jarred fruits** and **citrus salad, Clementine** and **Satsuma Mandarins**, and **Pineapples**.

****Tofurkey Plant-Based Roast & Gravy** are very popular with your vegetarian customers.

** Beginning Black Friday, **Lettuce** and **Tomato** displays for leftovers are perfect for the weekend after Thanksgiving.



10 Labor Scheduling and Order Planning can MAKE or BREAK your Thanksgiving Sales.

ORDERING TIP #1: Being a last minute orderer will burn you. PRE-BOOKS on key holiday items are strongly encouraged. You can always back off on your orders following the holiday, but you can't sell what you don't have in your store. If you have a scheduled delivery for Wednesday 11/27, that should be for last minute fill in and highly perishable only.

ORDERING TIP #2: Bring hard items in for THURS 11/21 - SAT 11/23; and fresh items in by SAT 11/23 - MON 11/25 **BEFORE** Thanksgiving so you and your staff are on the sales floor Wednesday 11/27, not in the back room waiting on and unloading a truck.

LABOR TIP #1: Your produce department should be set and ready to shop by 9:00 AM Monday through Wednesday for your customers' convenience. Don't get behind the '8' ball or you'll disappoint your customers. Stay ahead and your holiday business will go smoothly. Expect a 5% sales bump the week before Thanksgiving and a 15-20% bump the week of Thanksgiving, but packed into 6 days. Sales will then likely drop 15-25% for the week after Thanksgiving.

LABOR TIP #2: Schedule evening help on Sunday through Wednesday. Have your evening associates fill all hard goods like potatoes, onions and roots, along with semi-perishable product lines such as juices, dressings, dips, nuts, dried fruits, etc. Most of the fruit counters can also be packed-out in the evenings – apples, pears, citrus, pineapples, bagged fruit, and melons. Stock your greens and wet vegetables, mushrooms, berries, and grapes in the morning before opening.

Be Organized! Be Fresh & Full! And Be Successful! Have a great holiday! And THANK YOU for being our customer!

- Bruce Meidinger, Retail Services Manager, and the whole Four Seasons Produce Team

*Want more advice or tips individualized for your store situation? Contact your Four Seasons Produce Merchandiser or Sales Rep!

2019 THANKSGIVING SCHEDULE

SUNDAY 11/24 THROUGH TUESDAY 11/26 – Normal Office and Delivery Schedule

WEDNESDAY 11/27 – Normal office schedule, extra deliveries in some areas. Taking orders for Friday delivery.

THURSDAY 11/28 – Happy Thanksgiving! Office Closed. No Deliveries.

FRIDAY 11/29 & SATURDAY 11/30 – Normal Office and Delivery Schedule

**For clarification or special requests on this schedule, please contact your sales rep. or merchandiser. Have a safe and enjoyable holiday season!*



MARKET NEWS

CONVENTIONAL OUTLOOK

NOVEMBER CITRUS UPDATE

New crop **Satsuma Mandarins**, in bulk and 10/3lb bags, will be in season and available the week of 11/11, including **Stem & Leaf Satsumas**. Color and quality are expected to be good. The Satsuma variety typically has puffy, easy-peel skin, and excellent sweet-tangy flavor.

Clementine Mandarins from California will start in a small way for the second week of November with limited volume. Our first arrivals of 4/5lb gift box, 10/3lb bag, and 15/2lb bag California "**Halos**" brand **Clementine Mandarins** are expected for the week of 11/18.

NOTE: There are still a few **Import Mandarins** hanging around for early November, but new crop **Clementine Mandarins** from Spain will be a major issue for the rest of November and into December due to lighter harvest volumes, plus higher tariffs coming into the US.

New crop California **Navel Orange** color is improving here in early November. Sizing is still peaking on the 88ct and smaller with prices holding fairly firm. 56 ct and larger, though available, are still limited on volume, and prices remaining expensive.

The **Lemon** market dropped a little on fruit from California and Arizona, feeling pressure from the cheaper prices of fruit coming out of Mexico and some fruit remaining from Chile.

Fresh crop **Pummelos** from California are expected to arrive for the week of 11/11.



CV LETTUCE

ALERT! California **Iceberg Lettuce** prices have skyrocketed as availability has dramatically decreased for mid-November. Growers are wrapping up their Salinas, CA production, their Huron, CA production is not going well, and Yuma, AZ is not up and running with good volume yet. We are also seeing quality issues.

Supplies and quality will vary as growers are transitioning into different areas at different times. Expect poor fill rates for most of November.

NOTE: **Romaine Lettuce** and **Romaine Hearts** out of California has had consistently strong demand. There is talk of transitional gaps the next few weeks. This will drive prices higher again.



CV BERRIES

Blueberries are in excellent supply from Peru. We'll have plenty of pints and 6 oz., but we'll also have plenty of jumbo blues as well. Quality on all Peruvian Blueberries has been excellent. Overall volumes will begin to decrease over the next couple weeks as Peruvian imports are now over their peak harvest.

Raspberries will be tighter this week as growing conditions in Mexico have not been ideal. Look for pricing to climb slightly over the upcoming week. Quality has been nice.

ALERT! **Blackberries** continue to be in tighter than expected supply due to lingering effects of weather.

NOTE: **Strawberries** are much tighter this week and will continue to be in shorter supply as we head into Thanksgiving. Oxnard, CA and areas in Mexico aren't producing the supply that is expected at this time of year, and pricing is higher than usual. Florida is just getting started.



CV BROCCOLI & CAULIFLOWER

ALERT! **Cauliflower** from California is in high demand and growers are having lower yields. Without much volume, prices have spiked.

Eastern **Cauliflower** growers in the Mid-Atlantic have harvested everything they can ahead of freezing temperatures and will be finishing for the season.

Eastern **Broccoli Crowns** are tightening due to transitions to new fields further south, but we expect availability through the month of November.

Mexican product has tightened as well due to cooler, overcast days. California is going up in price as demand has increased.



CV SQUASH

Green Squash prices from Mexico continue to strengthen. Demand continues to increase, causing the rise, however prices are still very promotable. Quality has looked great.

Yellow Squash prices continue to be promotable. Lack of demand, with excess supply, has led to the weak market. Quality has looked very nice.



CV CHERRIES

Cherries are being flown into Miami, Florida this week from Chile. Prices are high and transportation will be a problem (finding a truck that will run at the proper temperature).

If possible, we will try to offer them the second week of November, if we can find a ride. Fruit coming by vessel into the Northeast ports are scheduled around Thanksgiving when we will see better volume and cheaper prices.



CV MELONS

We have seen very high prices from Arizona and Mexico on **Cantaloupes**. Relief is in sight as we will start the offshore season on fruit from Guatemala loading this weekend. FOB prices are the same, but we will see substantial savings on freight from Florida of two to three dollars.

Honeydew are the same as cantaloupes – prices are high, but we could see some cheaper prices as the offshore starts the second week of November from Florida.



CV TOMATOES

Hothouse grown **Beefsteak** and **Cluster Tomato** prices have gone up due to Canadian production gapping until December.

Roma and **Vine Ripe Tomato** prices have come off after a high couple of weeks. Florida is now in full production with excellent quality. Overall demand has been weak.

Grape, Campari, and several **Mini Snacking Tomatoes** continue to be promotable this week. Quality has been great.



CV PEPPERS

Green Pepper prices remain very promotable. GA and FL are in crown picks, while Mexico and CA have begun production. Peppers are available across the country and quality has been very nice.

11lb **Orange, Red, and Yellow Bell Pepper** prices are strengthening this week as Canadian hothouses are now finished for the season. Most production will now be out Mexico and quality has looked good.

15lb **Red Pepper** prices remain steady this week. Production from Mexico has started strong with great sizing and quality.



CV BRUSSELS SPROUTS

Brussels Sprouts out of California are readily available. Prices and demand will continue to increase as we approach Thanksgiving.

Plenty of **Brussels Sprouts** options are available - from loose 25lb boxes, to 9ct stalks, to micro-wavable bags!



CV GREENS

Collards and **Kale Greens** from New Jersey will be very promotable this week through Thanksgiving! Quality has been excellent.



CV CELERY

Celery demand out of California is continuing to increase. Most shippers are still not willing to commit to any pre-pricing or lid pricing. Prices will most likely continue to climb as long as there is an unknown in how much **Celery** is available.



CV GOLDEN BERRIES

Tangy, tropical, and sweet, **Golden Berries** have now started for the season. We now have 12/6oz clamshells of **Peeled Golden Berries** in stock, and this will be a steady item going forward through Christmas. These are best merchandised with your berries.



CV CRANBERRIES

Cranberries will be in excellent supply as we head into Thanksgiving. We will have plenty of Ocean Spray label, as well as locally grown NJ **Cranberries**. For those customers looking for larger pack sizes, we will also have a 12/2 lb. available.



CV GREEN BEANS

Green Bean prices will start the week high but will start to fall as the week goes on. More areas of Florida are beginning harvests, leading to more product availability. Quality has looked excellent.

NOTE: **Green Bean** prices are poised to jump this week as cold weather is expected for Georgia and parts of Florida.



CV PREMIUM APPLES

Premium Apples available this week:

- **Kiku** (PA grown)
- **Snap Dragon** (PA/NY grown)
- **Pink Pearl** (tan skin, pink flesh)
- **Lucy Glo** (tan skin, red flesh)
- **Lucy Rose** (red skin, red flesh)
- **Pinata**
- **Envy**
- **Jazz**
- **Sugar Bee**



CV RUSSET POTATOES

The **Russet Potato** market continues to strengthen, as strong demand and slightly limited availability are creating the perfect storm out of most growing regions. It's expected that this Potato market out of most growing regions will continue to rise leading up to Thanksgiving.



CV COLOR POTATOES

In addition to our premium Green Giant bag program, we will start to offer 10/5lb **Gold** and **Red Potato** bags out of Prince Edward Island, Canada for November that will be priced at a value.

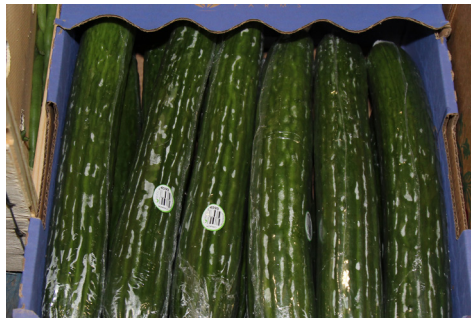
Another great item to promote is 10/5lb Pennsylvania grown **White Potatoes**.



CV LOCAL HONEYCRISP

We've had a nice run on Local US 1 **Honeycrisp Apples**, but these will finish the second week of November as we move through the remaining inventory. We will still have **Eastern Honeycrisp** of the higher grade well into December.

We will start bringing in Washington US 1 **Honeycrisp Apples** of comparable color and quality for about the same money so we can keep that price point rolling for the rest of fall.



CV CUCUMBERS

Seedless Cucumber prices will rise some this week as yields from Mexico have been down some. Product however should remain promotable with excellent quality and steady supply.



CV SNOW & SNAP PEAS

Snow and **Snap Pea** prices are beginning to weaken after a very high market for the past few weeks. Weather in Guatemala has improved significantly, leading to better yields.



CV ASPARAGUS

Asparagus prices should be steady this week. Quality from Peru and Mexico have been excellent while supplies have been steady.