



Field Flash

June 6, 2018

Apples

- Galas, Honeycrisp, Red Delicious, Gold Delicious, Jazz, Pinks, Granny Smith, Fuji, and Jonagold are available from Washington.

Asparagus

- Washington and California will see steady volumes, Michigan is into good supplies and hitting the peak of their season. Mexico has transitioned to production from Guanajuato now and will see better volume from this growing region thanks to the arrival of warmer weather. Supplies from Peru remain unchanged and steady through this forecast window.
- Origin(s): California, Mexico, Michigan, Peru, Washington.

Avocados – Imported & Domestic

- The typical summer Mexican production decline has already started and although supplies should be very stable through June, July through September will see much lower production and elevated prices. The summer crop is projected to have smaller sized fruit, so be prepared for elevated cost on 6Oct and larger.
- California continues to have very steady volumes through June, helping keep the Mexican market stable as their production begins to decline. Previous to the past reports, imports from Peru continue to be slower than anticipated due to dry-matter levels, this will change and there will be a better supply starting mid to late June, this too will help stabilize the overall summer market.
- Supplies exceed demand as summertime fruits are taking retail attention.
- Quality has been very good.
- Organic demand is still good and supplies are solid.

Green Beans – Florida

- Supplies will stay light in volume from the east. Florida is done for the season and Georgia's production continues to be impacted by rainy weather (interrupting harvests and creating for some quality issues).
- Coachella CA production will continue to produce steady volume.
- Origin(s): Georgia, Mexico

Berries

Strawberries:

- There have been 3 weeks in a row with record setting production in California.
- Santa Maria production will continue to increase each week. Peak volumes are expected in early June.
- Watsonville production has slowed down a little due to several weeks of cool weather. The week will start off with some warmer temps. Peak volumes in late June/early July.



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- Organic volumes are primarily now in California. Santa Maria volumes are now past peak volumes. Watsonville volumes also are slowing down due to weather.

Raspberries:

- Conventional volumes have not been this low since 2010 for the time of the year. We expect a big jump in volume around the 2nd week of June. Central Mexico will be done this week. Production in Oxnard should peak this week. Watsonville is the region that has been held back.
- Organic volumes are also coming in lower than expected. Baja has peaked and will be dropping. California volume is also increasing specifically from Oxnard. There is production in Watsonville and Salinas also which will start increasing in June but have been pushed back due to the weather.

Blackberries

- Conventional volumes have dropped off quickly in Central Mexico due to warmer weather and quality issues. Estimates have also come in lower as a result of weather in Watsonville. There is small production in Baja and California. California volumes start to fill in during the June timeframe but are behind. North Carolina starts around end of May and will be sold out of our forward distribution cooler in New Jersey.
- Organic volumes production also came in lower last week due to the weather. Central Mexico is decreasing and will be done by mid-June. Baja and our California production which is in Oxnard have been increasing volumes. The Santa Maria and Watsonville and Salinas regions are all behind as well.

Blueberries

- Volumes in Central Mexico will be done by mid-June. Baja will continue to trend downward thru June. California volumes are starting to peak. PNW looks to start around the middle of June. Availability is short in West.
- Organic volume in Baja is light will be decreasing to very minimal volumes. California peak is done and will continue to decrease. PNW should be starting the last week of June. Production is short in West.

Broccoli

- Light supplies with fairly strong market. Production should start to improve this week with some fields moving forward. The slight increase in production will put some downward pressure on the market.

Cabbage

- California will stay in steady volume.

Cauliflower

- Heavy supplies through this week then should moderate for next couple weeks. Market currently very weak but will firm as production eases and demand improves.

Celery

- Very good supplies continue as Oxnard winds down for the season ending mid-June. Salinas will begin slowly this week and be in full production by mid-June. Ample supplies and nice quality through the transition of growing areas.



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Cherries

- Last week for California product and first week for the Northwest. Market will be dropping weekly starting on 6/11 and continue for 4 weeks.

California Citrus– Domestic

- **Navels** – we are in the final weeks on navels. Supply is tight and market is moving higher
- **Mandarins** – CA mandarins finished
- **Lemons** – Deals to be had on large fancy lemons. Harvesting out of D2. Fruit is good quality. Argentina lemons will be arriving to the east coast

Imported Citrus

- **Imported Navels** – first fruit will arrive at the end of June.
- **Imported Lemons** – Argentina lemons will be arriving in the next couple of weeks.
- **Limes** - we have supplies loading out of Philly and McAllen. TX.

Corn

- Supplies will be in good, promotable volumes the next 2 weeks from Georgia. Quality from Georgia per our Topco field inspector's inspections is very good with no impact to quality from the rains Georgia has received. Florida is now done for the season. California and Texas stay steady in supply and Alabama has started their season.
- Area(s) into production: Alabama, California, Georgia, Texas

Cucumbers

- Supplies from the east will be light in volume particularly for supers. Prior rains have had an impact on quality making for heavier pack outs of selects. Supplies and quality from out west are good from both Baja, Mexico and California. Nogales is continuing to cross light supplies of only fair quality product (and their season is quickly drawing to a close)
- Areas into production include the following: California, Florida, Georgia, Mexico

Grapes

Update Highlights

- June Struggles Mexico / Coachella
- Specialty
- California Overall Crop
- Ad Planning

There is a lot in this email so please do not hesitate to reach out for specific answers. Our goal is to grow your sales.



Field Flash

June 6, 2018

- I hope you are well and ready to start a great summer selling season. I wanted to send a quick note as to what you can expect from me over the next couple of weeks as we start to have a good view of what the Grape crops will look like in 2018 from the different areas. Mother Nature has really pushed back the Mexican/Coachella crops and really set the stage for how the crops will come off and be marketed with a late crop and higher freight. It is also the time for you to work with me to set the necessary strategy for buying into these markets as we move through higher markets compared to years past.

Specialty Varieties

- Premium grapes sell!! More and more sales data are showing that there are core grape shoppers and premium grape shoppers. Stock these truly unique, sweet and crunchy grapes. This is a great way to extend your category and grow sales. Topco has made a commitment to the grower to have dedicated volume for our members. We need commitments for weekly pulls on these grapes. To make this work we have to have core business and organic business. There simply is not enough volume to go to people only wanting to support us on specialty grapes. We are working to grow your entire category and we cannot do that without your support all season and throughout the category.

MEXICO GRAPES:

- Grapes are coming off slowly and we expect this to be a short crop. The back half of June will be tight as we transition into the Central Valley out of Mexico
- Chance to finish early by the third and last week of June
- Overall Grapes – Based upon availability.
 - Greens – Most have them on the floor, market strong
 - Reds – crossing at end of week, still will remain light all year
 - Blacks – not as affected as red or green

COACHELLA, CA GRAPES:

- Most growers have started their Red ranches. Light this week.
- Mostly market Grapes - Season seems 8-10 days behind.
- Greens - A light start most will get going next week. – Market will remain strong
- Blacks will begin around the end of the week.



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Organic

AVAILABILITY	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
GREEN SEEDLESS								
SUGRAONE		█	█					
IVORY (SHEEHAN 21)		█	█					
TIMPSON			█	█	█			
THOMPSON				█	█	█		
LUSCO					█	█	█	
AUTUMN KING						█	█	█
RED SEEDLESS								
FLAMES		█	█	█				
KRISSY		█	█	█				
MAGENTA			█	█	█			
SWEET SCARLET				█	█	█		
TIMCO				█	█	█		
SCARLET ROYAL				█	█	█	█	
GEMMA ROSE*					█	█	█	█
ALLISON						█	█	█
BLACK SEEDLESS								
BLACK BEAUTY			█	█				
SUMMER ROYAL			█	█				
AUTUMN ROYAL				█	█	█	█	█

Specialty Grapes

- Exclusive program Bright Vine label.
- Available 1# Clams, 2# Clams, and random weight bags
- Let me know your volume and your ideas for this program

Specialty Grapes

	June	July	August	September	October	November	December
Candy Hearts			█	█	█		
Jack's Salute			█	█	█		
Sweet Celebration			█	█	█		
Sweet Nectar			█	█	█		
			Arriving 2019				
Sweet Globe			█	█	█		
Funny Fingers			█	█	█		
Moonlight			█	█	█		
Candy Dreams			█	█	█		
Sweet Sapphire			█	█	█	█	
Candy Crunch				█	█	█	█
				Arriving 2019			

California

SAN JOAQUIN VALLEY OUTLOOK

With lighter volume in Mexico, and in Coachella, and the weather in San Joaquin right now cooler than usual, we don't see a lot of volume coming out of Arvin, CA until closer to First week of July. End of June might be light for grapes and they are seeing retailers trying to lock "turn volume" for that time period so they don't run out. Promotional Volume mostly June 1st – June 18th, and then again starting the third week of July and through the end of the year. Over all as of now, everything looks good out of California. I will keep you posted!



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Ad opportunities

- July
 - Secondary ads - announce coming season to consumers
 - Organics
- August – Push
 - Grape-o-rama
 - Back to school
 - Organics
 - Specialty
- September – Push
 - Grape-o-rama
 - Back to school
 - Organics
 - Specialty
- October - Push
 - Fall Push
 - Organics
- Specialty

Leafy Lettuce (green, red, romaine)

- Very good supplies with soft market. Regional deals have started causing light demand out west. Summer planting will help offset the light demand. Very good quality. Production in Salinas and Santa Maria.

Iceberg Lettuce

- Very good supplies with strong yields and good weight. Cello weights ranging 40-46lbs. Market soft. Good supplies next couple weeks. Market and quality good for promotions.

Mangos – Imported

- Guatemalan fruit is ending its season.
- Mexico is experiencing some quality issues so expect lower volumes arriving.
- Michoacan is in full peak with Tommies but winding down with Hadens and Honey mangoes.
- Kents are arriving now, quality is good.
- Expect 9 and 10 cts. To be peak sizes in the coming weeks. June 18th – July 29th will be the peak of the Mexican mango season.

Watermelons

- Mexican (Loading in Nogales, AZ / McAllen, TX) continues to flow with good quality (brixing 10-12). New areas are being harvested letting Nogales continue for another 2 weeks. California/Arizona is beginning to scratch with bigger sizes available (36cts/45cts). Florida continues to have rain daily slowing production down. North Florida is just scratching with limited product available. Georgia is estimated to begin in the next 15 days.



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Onions:

- Market is seeing a bit of activity as compared to the last few weeks. California is in full swing and supplies are good, quality is excellent and demand has been good
- Texas is about done for the season
- New Mexico is just getting started, first harvest was late last week
- Washington State is done for the season with new crop set to begin in August
- Idaho and Oregon set to start new crop in August

Vidalias:

- Market is still good with excellent volume, most growers have transitioned to storage
- Peruvian sweets set to start around end of August

Organic Veg – Lamont/Salinas

- Iceberg Lettuce –Good supplies available, Market Steady
- Leaf- Good supplies on Green, Red and Romaine- Market Steady
- Broccoli- Decent supplies available, Market Steady
- Cauliflower-Decent supplies, Market Higher
- Celery/Celery Hrts- Extremely Tight supplies, Market Higher
- Cilantro- Good supplies available.
- Green Cabbage-Limited supplies available /Market Higher
- Mix (Chards, Kales, Parsleys)- Good supplies- Market steady
- Red Beets- Good supplies available, Market steady

Pineapples

- Quality is good, great eating, don't anticipate any issues. Looking for ads for July 4th.
- Origin(s): Costa Rica / Honduras

Potatoes – Western

- Market is still very tight with the exception of Idaho. Idaho is slashing prices to move the remainder of storage crop. Quality is still suspect and spotty. WI and CO continue to move through storage crop at a snail's pace to keep supplies under control to get through till end of August
- Florida is still doing well with Reds, gold and whites. Quality is excellent.

Squash

- Squash supplies are good with multiple growing regions now into production in the southeast and up the eastern seaboard. Out west Mexico is now virtually done for the season but still crossing very light volume of mostly # 2 quality product.
- California will be into good supplies of good quality product with multiple growing regions now into production.
- Area(s) into production: California, Carolinas, Florida, Mexico, Virginia



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Stone Fruit

This past week has been challenging to say the least – with the cooler temperatures throughout the growing regions and the high demand of the Memorial Day pulls...it has made for exciting days!! Throughout the weekend and into next week our temperatures will start to rise just a bit – but will still remain fairly moderate. Nice to live in...but the crops need warmer temps to help the fruit come on stronger and to size up as well.

- **Yellow Nectarines** – Started the Zee Fire variety – very nice color and sweet good flavor. Sizing at this time is peaking on 56's... with a few 48's. Once we get warmer weather – we will start to see larger sizing.
- **Yellow Peaches** – Packing the Crista and Honey Queen varieties. Supplies are steady – and will continue to be throughout the coming weeks. Sizing peaking on 56's...followed by 48's.
- **White Nectarines** – Harvest is off to somewhat of a slow start – but supplies will start to ramp up in the weeks to come. Week of 5/28 will be a big start for them with good volume coming. Sizing will continue to be primarily 64's... but will size up to 56's as the crop gets going.
- **White Peaches** – Next week will be a fair week but supplies will start to taper off at the end of the week. **We will see a "slight" gap the week of 5/28** until the Jillie White variety the first of June. This variety will bring large yields and larger sizing too!!
- **Apricots** – Starting the Honey Gold variety bringing with it good volumes and good sizing throughout. Supplies will be steady for the next several weeks.
- **Red Plums** – Starting a few Red Nectars this next week – with very light supplies to start. Supplies will start to ramp up in the weeks to come. We're seeing a run of size – 50/55's and larger. Market remains strong.
- **Black Plums** – Estimating to start our Black Nectars by the end of May...first part of June – especially with this cooler weather.
- **Pluots – Mottled** – Estimating to start **Honey Red Dino** first week of June. Reds/Blacks will follow about (5-7) days later.
- **Black Velvets** - Estimating to start the week of 6/04.

Tomatoes

Stem & Hydro

- Canadian & US farms are picking but due to rain, supply is suffering.
- Markets are increasing due to weather.

Round, Roma, Grape, Cherry

- **General Update**
 - Eastern tomatoes markets are strengthening due to tight supplies.
- **Rounds**
 - Rounds are still trending large in size. XL gas greens continue to be the best value on the size spectrum.
- **Roma**
 - Roma are widely available and being offered below Mexico's minimum to entice buyers.