

WORLDWIDE WEEKLY REPORT



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MARKET UPDATE

*Information compiled from **Produce Alliance**, **Veg Fresh**, **California Giant** and direct communication with our procurement team.*

The past week's storm hit the Salinas region hard. Fields have been flooded and muddy which has limited the harvest schedule. All Salinas row crop has been drastically affected including iceberg lettuce, romaine, broccoli, cauliflower, and berries. Processed iceberg in particular is non-existent in the market. We are subbing with heads of iceberg in the short term and expect to prorate any new inventory.

Not only have Salinas row crops faced significant challenges this week, but the mushroom supply is facing a global shortage. Some growers have noted this is the worst they've seen the market in more than 30 years. With labor issues, lack of raw materials, virus presence, and COVID complications, there is no relief in site on mushroom supply until after the holidays. We are sourcing wherever possible, but all suppliers are facing severe challenges and product will continue to be shorted or subbed with rising prices on any available inventory.

In addition to processed iceberg, we are seeing rising prices on all processed produce. It is no surprise that supply chain issues are severely impacting all aspects of our industry.

From labor shortages, strikes abroad, port delays, raw material limitations, importing complications, transportation issues and overall reduced supplies nearly all commodities and products are seeing price increases. In addition, we are seeing numerous issues with packaging resulting in subs for different pack sizes and unconventional packaging on some products in the short term.

South Georgia has started production on many winter veg commodities, however cool temps have impacted supply on bell peppers, squash, eggplant and cucumbers. Coupled with recent rains in the west and throughout Mexico, many items are experiencing quality issues.

FRUIT

APPLES

We're still seeing tight supply on smaller sizes for most varieties with a particular shortage on granny smith, pink ladys, and fujis. New crop is starting for some varieties and will continue to trickle in. East coast growers have minimal availability through May.

AVOCADO

Volume out of Mexico has dropped by about 33% in comparison to previous weeks. Coupled with effects of the recent hurricane we are seeing the market tighten. We expect this to be a short term situation and should see volume increase again with better size curve in the coming weeks.

BANANAS

Quality and availability are good however costs are rising due to supply chain challenges.

BERRIES

Blueberries

Supply is steady from South America and Mexico. Potential tightening of the market in mid-November before Chilean supply starts and the holiday pull begins.

Blackberries

Watsonville production is finishing and Mexico supply has begun, however supplies are gapping throughout this transition due to weather in Mexico. Demand exceeds supply.

Raspberries

Availability is steady but quality is fair with soft fruit. Watsonville has a few more weeks of production and Mexico is ramping up allowing for good volume crossing the border and stabilizing the market.

Strawberries

3-4" of rain in the past week have brought Salinas/Watsonville production to an end. Santa Maria production is down more than 50% for the week with weather damage. Supply is not expected from Mexico for several weeks and Florida will start in early December. Expect very limited supply as demand continues to rise.

CITRUS

Oranges

Navels have started with mostly fancy grade, small fruit available.

Lemons

Some imported lemons are available and quality is good. Market is limited.

Limes

Quality is improving but market is still volatile.

Grapefruit

Ruby grapefruit is available peaking on 32s and larger fancy and all small sizes 36s and smaller are tight. Texas is expected to start late.

GRAPES

Significant rains are impacting supply resulting in higher prices and tighter markets through the end of the season. CA harvest is expected to finish by the end of next week.

FRUIT

MELONS

Cantaloupe

CA supply has concluded and demand is exceeding supply while Yuma production is slow to start and deteriorating due to virus in the fields causing some crop failure. We hope this will improve in the coming weeks and expect offshore supply to begin in Florida by end of November.

Honeydew

Supply remains extremely limited, however Arizona and Mexican production has started with some larger sizes but still limited supply. We expect shortages over the next four weeks and subs on large sizes with hit or miss appearance.

Watermelon

Light supply available out of Nogales with marginal quality.

PEARS

We're stocking some locally grown Frog Hollow Warren peaches while supplies last. On the conventional market, small sizes remain tight.

PINEAPPLE

Great quality and good volume available. Prices rising due to supply chain challenges.

TOMATOES

East Coast

Rounds & Romas: Supply is extremely light out of Florida and quality is marginal with compromised shelf life due to weather-related pressure on the fruit.

Grape: Volume is slowly improving with better quality.

Cherry: Volume and quality are mixed with lighter supply. If possible, sub for grapes.

California

Romas & Rounds: The season is mostly done due to rain. Transitioning to Mexico & Florida.

Mexico

Rounds & Romas: Markets are still volatile although more volume is crossing through Otay and McAllen with good quality.

Grape: Volume and quality are improving this week, but high demand from the east is driving pricing up and limiting supply.

Cherry: Supply is light and quality is mixed. If possible sub for grape tomatoes.

GREENS

ARUGULA

Supply and quality are good this week.

BABY & BUNCHED SPINACH

Tip and wind burn continue to be a concern as well as insect pressure, aphids, and mildew due to foggy mornings. Baby spinach is facing less quality issues.

GREENS, CONTINUED...

BUTTER LETTUCE

Volume and quality are steady this week.

GREEN LEAF

Production out of Salinas is still decreasing and supply is expected to be extremely tight for about 3-4 weeks while Salinas weather suffers.

ICEBERG

Supply continues to be tight due to sporadic weather patterns, change in season and the INSV virus affecting yields. Market will remain active for the near future as Huron was pushed back due to weather and Yuma isn't expected to ramp up for several weeks. Quality is suffering and prices will be high. Supply on processed iceberg is nearly non-existent, expect subs or shorts. Prices will rise significantly and orders will be pro-rated

KALE

Bunched kale supply is still plentiful.

RED LEAF

Good volume and good quality.

ROMAINE & ROMAINE HEARTS

Supply is extremely limited due to weather in Salinas, quality issues at the field level and lower yields due to INSV (impatiens necrotic spot virus).

SPRING MIX

Supply is good but quality concerns continue such as sclerotinia, fringe burn, insect damage and mildew.

VEGETABLES

ARTICHOKES

Volume continues to be low with limited harvest schedule. Quality is excellent.

ASPARAGUS

Supply is increasing and quality is good.

BOK CHOY

Supply is steady but increasing demand has pushed the market pricing up.

BROCCOLI/BROCCOLI FLORETS

Market is extremely short on bunch and crowns due to weather complications in Salinas. Escalated pricing due to light supply which is expected to continue until we transition to Yuma at the end of November. Demand exceeds supply, sub wherever possible.

BRUSSELS SPROUTS

Supply is stable and quality is good with minor defects, good shape and color.

VEGETABLES, CONTINUED...

CABBAGE

Green

Supply is lighter but quality is consistent.

Napa

Supply and quality are improving although strong demand is elevating the market.

Red

Good quality and supply.

CARROTS

Jumbos continue to be an issue along with snack pack options. Supply will continue to be a challenge across the board -- expect increasing prices.

CAULIFLOWER

Light supply continues due to rains complicating harvest.

CELERY

Market is rising while supply decreases due to some quality issues at the field level. Market will continue to increase as we approach the holidays.

CILANTRO

Supply is lower this week.

CORN

Corn supply and quality is mixed. Steady relief in the market is not expected until Mexico starts in mid-November. Expect quality issues and rising prices. Sub with bi-color corn.

CUCUMBERS

Slicer cucumbers are lighter in supply from South Georgia with good quality. Supply is increasing from Otay, Nogales and McAllen as well. Market on english cucumbers remains very tight out of Canada -- Mexico is expected to start soon.

EGGPLANT

Supply has transitioned to South Georgia but cooler weather is causing lighter supply. Transition to the desert on the west coast and supply out of Nogales are both expected in the next week.

FENNEL

Quality issues in the field are reducing overall yield and volume. Majority 18/24ct.

GARLIC

Garlic continues to be extremely tight. The market on peeled garlic especially is very volatile due to complications at the local ports holding up Chinese product. California crop is getting tight as well. If this continues we expect shortages in the market.

GINGER

Supply continues to be inconsistent and the market is volatile. Supply will be tight for the foreseeable future.

VEGETABLES, CONTINUED...

GREEN BEANS

Light production in the east due to rain and cooler weather. In the west, supply is light out of California until product comes in from Mexico in the coming weeks. Quality is marginal throughout this transition period. If possible, sub with french beans which have stable volume and strong quality.

GREEN ONIONS

Supply and quality are good this week, however the market is extremely active as northern Mexico supply is short due to weather challenges.

JICAMA

Supply continues to be steady crossing through McAllen.

MUSHROOMS

The mushroom shortage is becoming a global issue. From shortages of labor, virus presence, reduction in farmers throughout COVID, and issues with supply of raw materials such as logs and peat moss, the supply is down nearly 40%. Shortages are expected to continue on all varieties throughout the holiday season with relief hopefully coming in early 2022. Growers have stated this is the toughest mushroom market in more than 30 years. Oyster mushrooms are being prorated and shorts expected. Crimini mushrooms and XL portabellos are also very limited and white mushrooms continue to be prorated as well.

ONIONS

Supply is extremely light due to this year's heatwaves and windstorms throughout the growing season. New crop is down 40%+ and available onions in all colors are peaking on a medium size. Harvest is mostly finished and should entirely wrap up in the Northwest by next week. Jumbo, Colossal, and Super Colossal onions are rising rapidly in price and limited availability to persist. We hope to see relief in the first quarter of 2022 if Mexican and imported supply comes through, otherwise the market will be strained until approximately May when California and New Mexico start. With the recent national attention on the Salmonella outbreak in onions imported from Mexico, there are concerns that there won't be considerable relief in the marketplace from Mexico as many importers are changing their sourcing guidelines to omit Mexican grown onions. If Mexican imports decrease, pricing could rise while supply tightens.

PARSLEY (CURLY, ITALIAN)

Overall supply is steady.

PEPPERS

Bell Peppers

Tighter supply on green bells as the weather cools off in South Georgia but quality remains good. Production is still winding down on greens in the west and has been reduced due to rains as well. Red and yellow bells are also tight this week in all growing regions. Quality remains good.

Mini Sweet Peppers

Lighter supply available this week.

VEGETABLES, CONTINUED...

PEPPERS, continued...

Mixed Chili Peppers

Supply out of South Georgia is steady on long hots, poblano, cubanelle and jalapenos with outstanding quality. McAllen is in transition with very tight supply on all varieties. Quality issues are expected throughout the transition period. California supply is expected to conclude within the week. Baja supply is light due to cool weather but will transition to Nogales by late November.

PICKLES

Good supply and quality out of Florida. Mexico supply should start up next month.

POTATOES

Market is improving on all sizes as the Norkotah crop is on the larger end of the size profile. 80ct and smaller, as well as #2, are getting progressively tighter. We anticipate the market to tighten in the spring and size will become a real issue when Norkotahs begin to wind down and only Burbanks are available. Idaho and Washington are both limited in supply due to extreme weather conditions resulting in low yields.

RAPINI

Market is steady with good quality although harvest is delayed due to muddy fields.

SNOW & SUGAR SNAP PEAS

Volume is very low and quality is fair out of Guatemala. Peruvian crop is also low in volume but showing better quality. Supply has been impacted by logistic complications.

ZUCCHINI & YELLOW SQUASH

Fall squash is looking great with stable volume out of South Georgia. California production is ending due to weather and transitioning to Nogales where quality is expected to be great. Squash blossoms however have been limited due to cold weather conditions.

NOW AVAILABLE FROM THE FARMER'S MARKET!

#8887 - FROG HOLLOW WARREN PEARS - 10LB

#18333 SUNGOLD TOMAOTES - FLAT

**NOTE* Quantities are limited as these items are sourced from local farmers at the Santa Monica Farmers Market weekly. Check with your rep for availability!*

OTHER COMMODITY UPDATES

We continue to experience issues while sourcing some commodities due to complications such as labor shortages, supply chain issues, and raw material shortages. Please note the following commodities are currently experiencing challenges in the marketplace resulting in rising prices and decreasing availability.

PROCESSED PRODUCE
PAPER GOODS, MASKS, GLOVES
PACKAGING SHORTAGES -- EXPECT PACK SIZE SUBS & UNCONVENTIONAL
PACKAGING IN THE SHORT TERM
SALMON
IMPORTED CHEESES
EDIBLE FLOWERS
SPECIALTY TRUFFLE PRODUCTS

PLAN AHEAD: VETERAN'S DAY

The local Los Angeles produce market will be closed on Thursday, November 11th. Plan ahead with any specialty orders to avoid supply complications during this temporary closure for the Veteran's day holiday.

WORLDWIDE PRODUCE WILL REMAIN OPEN WITH NORMAL OPERATIONS.

Fall Seasonal Decor

LIMITED AVAILABILITY PRE-ORDER EARLY!

PUMPKINS (LIMITED)

MIXED GOURDS

CORN STALKS

INDIAN CORN

STRAW HAY BALES

and more!

Fall decor and specialty produce is available through November or while supplies last



HERBS

HERB SUPPLY/QUALITY - COUNTRY OF ORIGIN

Arugula Steady/Steady- USA
Basil Steady/Steady - USA/MEXICO
Opal Basil Steady/Steady - MEXICO
Thai Basil Steady/Steady - MEXICO
Bay Leaves Steady/Steady - COLOMBIA
Chervil Steady/Steady- USA
Chives Steady/Steady - MEXICO
Cilantro Steady/Steady- USA
Dill Steady/Steady- MEXICO
Epazote Steady/Steady- MEXICO
Lemongrass Steady/Steady - USA
Marjoram Heat/Very Limited - USA
Mint Steady/Steady- USA
Oregano Steady/Steady- USA
Italian Parsley Steady/Steady- USA
Rosemary Steady/Steady - USA
Sage Steady/Steady - USA
Savory Heat/Very Limited - USA
Sorrel Steady/Steady - USA
Tarragon Steady/Steady - MEXICO
Thyme Steady/Steady - USA
Lavender Steady/Steady- USA
Lemon Thyme Heat/Very Limited - USA
Lime Leaves Steady/Steady - USA

QUESTIONS?

Reach out to your Sales Rep with any product concerns, substitution requests, or quality questions!

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