

Weekly Market Review

September 17, 2021

Overview

The avocado market continues to struggle on large sized fruit out of California and Mexico; Pricing is escalated, and large sized fruit is extreme. We ask that you be flexible on sizing this week and/or sub over to Peruvian fruit to maintain service levels. We are seeing better numbers on dry veg out of the intercoastal valley regions and moving away from the central valley. We are seeing improved production on tomatoes out of Central Mexico fair production on rounds and grape tomatoes, whereas cherry tomatoes will most likely remain snug for the rest of the year. We are seeing very light production on romas due to quality issues related to ongoing weather pressure as well as yield losses on the mainland as well as Baja. In the east, the tomato category is dropping production quickly across all varieties and we are seeing escalated markets due to the ongoing struggle with weather related pressure from several tropical events. We are also seeing weather affect commodities in the east (corn, green beans, pumpkins, and cucumbers). We will continue to observe areas hit by flooding in the northeast and expect severe crop loss as growers close the season. We are starting to see some relief as transition begins to move south to Georgia and South Carolina for the fall harvest. **Lettuce is in an active market; however cello lettuce is escalated at this time.*

MARKET ALERT

- Avocados – **ESCALATED (Extreme on large sized fruit)**
- Asparagus - **ESCALATED**
- Brussel Sprouts – **ESCALATED**
- Carrots (Jumbo) – **ESCALATED**
- Chili Pepper (Serrano) – **ESCALATED**
- Cucumbers - **ESCALATED**
- Green Beans – **ESCALATED**
- Garlic – **EXTREME**
- Ginger – **EXTREME**
- Green Bell Pepper (East) - **ESCALATED**
- Honeydew - **EXTREME**
- Pears (Smaller Sizes) – **EXTREME**
- Pickles- **ESCALATED**
- Tomatoes (West) – Romas & Round - **ESCALATED**
- Tomatoes (East) – Rounds, Romas & Cherry – **ESCALATED**
- Tomatoes (Mexico) – Cherry & Romas - **ESCALATED**
- Romaine Hearts – **ESCALATED**

WATCH LIST

- Apples (Small size Granny Smith)
- Strawberries
- Sugar Snap and Snow Peas
- Romaine 24 ct
- Liner Lettuce 24 ct
- Broccoli and Broccoli Florets
- Green Onions
- Napa
- Transportation

Transportation

Freight rates continue to impact all concepts resulting from increases on the cost of truck loads, due to the ongoing upsurge in fuel prices in addition to labor with shortage of drivers and warehouse pickers. The national average price per gallon for diesel is \$3.34 per gallon and we are looking at a \$3.15 national average rate per mile for a reefer truck. Produce Alliance and its Members are working to negotiate the best freight rates with the most reliable freight companies. We thank you for your partnership as we work through this extremely challenging period facing our industry. As we continue to return to normal

activities travel and entertainment the uptick in spend has more than offset the negative growth for durable goods by 300%. In an average year, we would expect June spot rates to peak above May levels, and although this was not the case this year, we saw rates follow a normal seasonal pattern leading up to early July. The challenges that carriers are facing with driver and truck availability will continue to limit availability of capacity to support pickups and there continues to be a vast amount of uncertainty as to when to expect true deflationary market conditions.

It truly is an unprecedented time in the freight market, so please reach out to your Produce Alliance representative to understand solutions from sourcing outside of produce items, to evaluating pricing moving items from whole to processed on account of labor, and deeper yield per case.

Weather

OXNARD, CA:

Thu 9/16 66° 55°F  Mostly Sunny	Fri 9/17 68° 54°F  Partly Cloudy	Sat 9/18 66° 54°F  Partly Cloudy	Sun 9/19 67° 55°F  Partly Cloudy	Mon 9/20 69° 57°F  Sunny	Tue 9/21 76° 57°F  Mostly Sunny	Wed 9/22 73° 56°F  Sunny
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FRESNO, CA:

Thu 9/16 94° 56°F  Sunny	Fri 9/17 94° 58°F  Sunny	Sat 9/18 91° 57°F  Sunny	Sun 9/19 85° 56°F  Sunny	Mon 9/20 85° 57°F  Sunny	Tue 9/21 95° 59°F  Mostly Sunny	Wed 9/22 98° 59°F  Partly Cloudy
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HENDERSONVILLE, NC

Thu 9/16 74° 62°F  Showers	Fri 9/17 74° 62°F  Showers	Sat 9/18 80° 62°F  Partly Cloudy	Sun 9/19 80° 63°F  Partly Cloudy	Mon 9/20 76° 62°F  Showers	Tue 9/21 77° 61°F  AM Showers	Wed 9/22 76° 58°F  Partly Cloudy
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HUDSONVILLE, MI

Thu 9/16 81° 58°F  Sunny	Fri 9/17 84° 63°F  Sunny	Sat 9/18 80° 55°F  AM Thunderstorms	Sun 9/19 85° 63°F  Sunny	Mon 9/20 88° 65°F  Partly Cloudy	Tue 9/21 85° 66°F  Partly Cloudy	Wed 9/22 77° 60°F  Scattered Thunderstorms
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JALISCO, MX:

Thu 9/16 78° 65°F  Thunderstorms	Fri 9/17 80° 66°F  PM Thunderstorms	Sat 9/18 81° 66°F  PM Thunderstorms	Sun 9/19 79° 65°F  Thunderstorms	Mon 9/20 76° 64°F  Thunderstorms	Tue 9/21 81° 64°F  PM Thunderstorms	Wed 9/22 83° 66°F  PM Thunderstorms
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SALINAS, CA:

Thu 9/16	Fri 9/17	Sat 9/18	Sun 9/19	Mon 9/20	Tue 9/21	Wed 9/22
66° 53°F	66° 53°F	66° 58°F	67° 52°F	72° 54°F	79° 57°F	76° 55°F
						
Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Mostly Sunny	Mostly Sunny

Good Buys

Commodity	Market Update	Produce Expert Tip
Yellow Bell Pepper	Excellent supply and good quality available	Yellow bell peppers are crunchy and juicy with a mild, sweet flavor. They are also an excellent source of vitamin C and contain vitamin A, fiber, calcium, iron, and potassium. Although bell peppers are often thought of as a vegetable, but they are a fruit because they contain seeds and grow on a flowering plant. Yellow bell peppers are native to tropical America and have been growing since ancient times.

Fruits & Vegetables

Avocados: **ESCALATED** As we continue to monitor avocado market, we are seeing costs rise due to supply winding down out of California and Peru. At the same time, Mexico is transition from the Flor Loca crop to the Avenejada crop. As predicted, being the current crop was already down by over 30 percent, we will continue to see a rapid decline of large fruit and do not expect the size curve to improve for at least another 3 to 4 weeks. When we initially discussed this condition, we predicted Labor Day as the target date for a sign of improvement. However, currently, with several days of heavy precipitation with two tropical systems impacting the regions, there have been further delays for an additional two weeks. We are hoping the rain delay will help size up fruit on the front end of the crop and stabilize the markets evening out the size distribution. Having said that, our contracts have been performing quite well through these challenging times and we have collaborated with our grower partners, our end user partners to make the necessary adjustments to sizes and growing regions where necessary to maintain service level.

Bananas: Banana quality and availability are good. No problems with supply.

Pineapples: Pineapple volume good and quality is great.

Grapes: Current California weather conditions are good and will not impact growing conditions or supply for grapes. Pricing, overall, is pretty steady with a bit of a tick up on certain green varieties.

Berries

Strawberries: Due to warmer temperatures, we are observing increased production this week. Growers are reporting an improvement in fruit size and improved fruit quality. We expect favorable volumes the next couple of weeks.

Blueberries: British Columbia will end next week, and Oregon production will continue with decreasing volumes for the next 2 weeks. Washington has finished production for their season and Mexico production began last month with light volume and will continue to increase each week moving forward. Baja production has begun and will slowly ramp up over the next few weeks. Peruvian season has started, and we will see increasing volumes moving forward.

Blackberries: We are seeing higher supply due to favorable weather, although we expect the additional supply to be short-lived. During the next couple of weeks, we expect a decrease in volume since most of the surface area will be in post peak production. Washington and New Jersey will conclude their season and we expect central Mexico to start production the first week of October.

Raspberries: Lighter supply than expected out of all CA regions and Baja due to lower yields. The outlook is to remain steady into next week and increase thereafter as the Central Mexico regions start to contribute significant volume. September is a gap in production volume, but we have a lot of volume coming for October and November.

California Citrus

Valencias: Sizes still peaking 88/72/56, quality has been good. Small sizes 113/138, both grades, are very tight and shelf life is becoming shorter. Browning may become visible on the fruit – these physical signs are due to the excessive heat waves this summer. Buyers are advised to buy Fancy Grade.

Lemons: Coachella, CA & Yuma AZ are gearing up for harvesting new crop. Coachella has been able to harvest small volume, and gas times are high. Yuma will soon follow, as there is more humid/hot days and harvest is very sporadic.

Limes: Market is stabilizing after the hurricane. Pricing in the high teens, quality remains hit and miss with heavy scarring

Grapefruit: Ruby grapefruit now available. Size is peaking on 32s and larger Fancy and all small sizes 36 and smaller are tight. Texas is expected to start very late.

Imports/Specialties available: Import clementines/mandarins are available.

West Coast Lettuce

Butter Lettuce: Supply is expected to be plentiful this week. Now is an opportunity for promotion.

Green Leaf: Salinas green leaf production volumes are tracking steady for the week. Overall quality is nice with a good green color, full heads, and good texture. Demand and pricing are steady.

Red Leaf: Good volume with good quality and the market is steady.

Romaine & Romaine Hearts: **Romaine – WATCH LIST Romaine Hearts – ESCALATED:** Romaine and romaine heart production supply is beginning to trend lower. We are experiencing some quality issues at the field level ultimately reducing yields. Plants that are healthy are exhibiting good color, texture, and quality overall. We will continue to be subject to occasional fringe burn and lighter weights. Overall demand is steady, with better demand on hearts. Market is higher

Iceberg Lettuce: Lettuce supply continues to be lower than normal. We are still seeing some quality issues at the field level, but overall quality remains good. Weights are slightly lower, and markets are active.

Eastern and Western Vegetables

Green Bell Pepper: **ESCALATED** Product is lighter this week out of the south as transition is on the horizon from North Carolina back to South Georgia while the Northeast is rapidly ending for the season. In the

west, the excellent production continues out of the intercoastal valleys with steady volume expected on all sizes but larger sizes. Quality is outstanding and we do not anticipate any pro-rates currently.

Red Bell Pepper: Excellent supply and good quality available.

Yellow Bell Pepper: Excellent Supply and good quality available.

Mini Sweet Pepper: Excellent supply and good quality available.

Mixed Chili Pepper (Serrano Peppers) ESCALATED We are seeing some local deals continue in the east with stable supply. In McAllen, we are seeing supply start to improve as crossings increase. Serranos remain very tight and escalated this week and we need to keep a close eye on some of the microclimates as some regions are reporting loss due to damage mitigation from recent rain flooding. We are not seeing any supply issues on contracts at this point, because we have worked with our growers to navigate through some of these challenges this late in the season but will continue to monitor. We do need to keep in mind that particularly this time of year quality issues can easily come about, and pricing can reflect quality particularly when dealing with older plantings, older growing regions so caution on open market quotes this time of year when transition can be tricky. On the west coast, there is lighter supply crossing from the Baja while California continues to produce decent numbers. West coast volume is also down on tomatillo and serrano.

Eggplant: WATCH LIST Local eggplant out of the Northeast and Michigan are winding down, we should see South Georgia scratch over the next 10-14 days. Eggplant out of the Central Valley is winding down and should transition to the desert over the next two weeks followed by Nogales first week of October.

Slicer Cucumbers: ESCALATED We are seeing lighter supply out of all regions this week and supply is snug. We are starting to see cooler nights in Michigan and North Carolina, fortunately we should be transitioning to South Georgia over the next ten days. Cucumbers in the west are lighter this week crossing through Otay, Nogales, and McAllen. Overall quality is good in the west, but in the east, we will see weather related quality issues. We do not anticipate any pro-rates currently.

English Cucumbers: Market and supply are good, and quality is outstanding. Good crossings from Canada and Mexico.

Pickles: ESCALATED WE are seeing firmer markets this week and supply is light. Quality is mixed

Green Beans: ESCALATED We are seeing very light production in the east mainly due to rain. We expect some South Georgia production to ramp up over the next few weeks and should begin to bring this market back in line for the fall and prepare for the holidays barring no weather as we transition to Florida. In the west, supply is light out of Fresno and Southern California and will remain light until transition to Mexico late October. Quality will be marginal until we transition to Mexico. We do not expect pro-rates however, we recommend subbing to French beans when possible or to soft squash, when possible, simply due to quality.

French Beans: Volume remains stable, and quality is strong.

Zucchini/Yellow Squash: We are starting to see supply ramp back up out of North Carolina this week and will see delays in New Jersey due to weather. The upper Midwest will continue for a few more weeks and

South Georgia is starting to harvest. Quality is mixed in the east, and in the west, good supply continues out of Santa Maria and Baja. Quality is good on green and marginal on yellow. We should start to see new crop squash cross through Nogales in 10-14 days!

Herbs

We are seeing very good supply on almost all fresh herbs and flowers currently and quality is outstanding.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	USA/ MEXICO
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA
Bay Leaves	Steady	Steady	COL
Chervil	Steady	Steady	USA
Chives	Steady	Steady	MEXICO
Cilantro	Steady	Steady	USA
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	USA
Thyme	Steady	Steady	USA/MEXICO
Lemon Thyme	Heat	Very Limited	USA
Lavender	Heat	Very Limited	
Lime Leaves	Steady	Steady	USA

Melons

Cantaloupe: Cantaloupe volume has started to seasonally decrease as we reach the stretch run of the California season. Each week will see fewer cantaloupes being harvested with the conclusion of California melons anticipated by mid-October. Arizona production is expected to be ready by early October.

Honeydew: EXTREME Honeydew has reached a demand exceeds supply scenario on larger sizes. The situation looks to remain dire for the balance of the California melon season with no relief in sight until the desert and Mexican production begins which should be around mid-October. In the meantime, flexibility of sizing will likely be required at time of loading, and it is recommended to begin advising customers of the anticipated shortfall in honeydew production over the next four weeks at minimum. External quality may also be sacrificed as growers attempt to get whatever melons they can into the pack to fulfill orders.

Watermelon: Supply available out of the Midwest, Texas, and Indiana. We are also seeing some light volume out of the Mid Atlantic. Good volume out of California although logistics continue to be a challenge in all markets. Quality in the west is very nice.

Mixed Vegetables

Artichokes: Volume continues to be low this week although quality is excellent. We expect volume to remain low through the month of September with pricing steady to potentially higher

Arugula: Supply and quality are good this week.

Asparagus: ESCALATED Low volume, good quality, and high demand. Supply affected by major logistic issues including air and ocean shipments.

Bok Choy: Supply is expected to be plentiful for the next three weeks. Now is an opportunity for promotion.

Broccoli/Broccoli Florets: WATCH LIST Supply is much lighter, pricing is increasing.

Brussels Sprouts: ESCALATED Supply looks to be increasing over the next 2-3 weeks. Quality is good with some occasional insect damage noted.

Carrots: ESCALATED Shippers are still struggling with jumbos and table due to labor (these are hand pack items). Due to the unprecedented weekly volume needed for new snack pack options for school and community programs we continue to struggle with supply and demand. Pricing is increasing.

Cauliflower: Supply is expected to be plentiful this week. Overall quality and appearance should be very nice.

Celery: The market is steady, and business is better this week with good supply.

Corn: WATCH LIST Corn supply remains mixed by region due to weather. In the west, valley corn is tight due to heat, New York and Michigan corn are in good supply with, but quality is mixed.

Cilantro: Cilantro supply is expected to be plentiful this week. Now is a good opportunity for promotion.

Fennel: Good supply and quality is very strong.

Garlic: EXTREME Garlic contracts have now fully transitioned to new crop California, although supply is still light, and market remains extreme.

Ginger: EXTREME Ginger is very volatile due to very inconsistent supply and market is higher. Supply remains tight for the foreseeable future.

Green Cabbage: Supply is steady, and quality remains consistent with sizing and overall appearance.

Green Onions: WATCH LIST The market is still active although supplies are improving, and we are seeing a slight decline in the market.

Jicama: Steady supply available crossing through McAllen.

Kale (Green): Bunched kale supply is expected to be plentiful for the next few weeks.

Mushrooms: Supply and quality continue to remain stable.

Napa Cabbage: WATCH LIST Overall supply and quality continue to improve although yields remain below normal volume.

Parsley (Curly, Italian): Parsley supply is expected to be plentiful for the next three weeks.

Rapini: Good supply and quality remains strong.

Red Cabbage: Supply is steady with good quality.

Snow Peas: Guatemala: WATCH LIST Guatemala: Very low volume, fair quality, and high Demand (production affected by weather and supply affected by major logistic issues) **Peru:** Low volume, high demand, and good quality. Supply affected by major logistic Issues

Sugar Snap Peas: WATCH LIST Guatemala: Very low volume, fair quality, and high Demand (production affected by weather and supply affected by major logistic issues) **Peru:** Low volume, high demand, and good quality. Supply affected by major logistic Issues

Spinach (Bunched): Quality concerns are tip and wind burn. Insect pressure, aphids, and mildew are also an issue due to foggy mornings.

Spinach (Baby): Supply and quality are good this week.

Spring Mix: Supply is good and quality concerns now are tip burn and wind burn.

Sweet Potatoes and Yams: New crop harvest starts as soon as next week for some sweet potato growers. We are looking at new crop shipments starting in about 6 weeks after they cure. Last year's crop is starting to dwindle, and inventory is getting tight, but supply should hold to avoid gap.

Onions:

The Northwest continues to ship a smaller size profile, with Colossal and Super Colossals being limited. Typically, the onion market is seeing a reduction in price during harvest. This season, given the slow start

for a lot of growers, in addition to poor size and yields, we are seeing the market increase on all colors and sizes, outside of medium yellows. This is an unprecedented situation and is indicative of the crop this season in the Northwest. We should see jumbo yellows normalize in the coming weeks when growers are full steam ahead, however, the typical influx of supply that pressures pricing down may not occur this season. Additionally, there are still New Mexico and California onions being put onto the market as well in certain parts of the country. As those supply areas dry up, the demand pressure on the Northwest should increase as well. Northwest growers are continuing to express great concern for the long-term health and supply of this year's crop due to both wind and heat events during the growing season this Summer. Record high temperatures in Idaho/Oregon/Washington are already negatively impacting yields in the early fields. The situation should be somewhat clarified as growers continue to get into new fields as well and realize just what type of supply they have on hand. Labor is also presenting some major challenges and limiting production out of both Idaho/Oregon and Washington. Once we get past the first of the year, supply is expected to further tighten, and if the heat has detrimental effects on the onions long term storage ability, we may see elevated levels of shrink. Freight continues to be challenging out of all onion growing regions. Finding the right truck and rate seems to be as much about timing and finding 'one-off' deals in comparison to what most carriers are commanding. A lot of freight analysts are predicting some relief sometime in 2022. At this point, we are not hopeful of it taking place any sooner as we will be approaching the holiday season soon.

Potatoes:

The potato market is now beginning to experience pricing relief on 4oct through approximately 8oct. Size profiles have flipped, and larger count cartons are now more plentiful, while smaller size cartons, No. 2 grade potatoes, and consumer bags are in short supply. We do not anticipate relief on small size potatoes for a few weeks as growers try to move through the larger profiles. In typical seasons, we generally see pricing stressed to some fairly low numbers on all sizes. The behavior of the market this season during harvest is a good indicator of the long-term outlook of the crop. The concern regarding as much as 30% or more of the crop remain alive and well, however, we likely will not feel just how tight the market is until we get to around Spring and Norkotahs begin to wind down. Once we get to the later part of the crop, and are shipping Burbanks exclusively, size is going to be a real challenge. Unfortunately, we are not in a situation where we can make up the Idaho shortfall with supply from other growing regions, as Washington experienced similar growing conditions, and they are up against the same challenges related to low yields. The concern surrounding trucks continues to be elevated as rates these past few weeks have continued to increase. Shippers and receivers should be prepared to continue to see elevated freight rates at least through this calendar year. In normal circumstances, we see a drop in rates during the first quarter, but it remains to be seen if that will take place this coming year.

TOMATOES

East Coast

- **Round Tomatoes: ESCALATED** We are seeing very light supply and expect to see lighter inventory for the next several weeks. Between the gradual winding down of the mountain season and preparation for the move to the Carolinas back to Florida, the category has certainly fallen below expectations for this time of year. We do expect a firm market through most of September and well into October. We are working closely with our growers to keep you informed of any issues or supply shortfalls we may see over the next several weeks during transition back to South Carolina and Florida. We expect marginal quality during this time and suggest keeping lighter inventory as shelf life will be comprised from all the weather-related pressure on the fruit. We do not anticipate any pro-rates currently on round tomatoes.

- **Romas Tomatoes: ESCALATED** We are seeing very light supply and expect to see lighter inventories for the next several weeks. Between the gradual winding down of the mountain season and preparation for the move to the Carolinas back to Florida, the category has certainly fallen below expectations for this time of year. We do expect a firm market through most of September and well into October. We are working closely with our growers to keep you informed of any issues or supply shortfalls we may see over the next several weeks during transition back to South Carolina and Florida. We expect marginal quality during this time and suggest keeping lighter inventory as shelf life will be comprised from all the weather-related pressure on the fruit. We do not anticipate any pro-rates at this time on roma tomatoes, but should we have any shortfalls recommend subbing to rounds.
- **Grape Tomatoes:** We will see a mix on volume and quality over the next several weeks mainly due to the weather for the entire snacking tomato category. We will continue to observe and evaluate the condition and health of the crop with our growers for a sign of improvement but expect light volume through the remainder of the summer programs. We do not anticipate any pro-rates currently.
- **Cherry Tomatoes: ESCALATED** We will see a mix on volume and quality over the next several weeks mainly due to the weather for the entire snacking tomato category. We will continue to observe and evaluate the condition and health of the crop with our growers for a sign of improvement but expect light volume through the remainder of the summer programs. We do not anticipate any pro-rates currently.
- **Organic Tomatoes: WATCH LIST** Supply very limited, and quality is marginal.

Mexico

- **Round Tomatoes:** Markets remain mixed this week despite a bit more volume crossing through Otay and McAllen. Overall quality is very nice on rounds.
- **Roma Tomatoes: ESCALATED** Lighter crossings this week on romas as we continue to struggle with volume due to weather related pressure. We are seeing a lot of quality issues this week which is causing several rejections at the border. On the Baja, volume is lighter this week and may be short crossing through Otay. We may see minimal pro rates this week and recommend subbing to a round tomato if necessary.
- **Grape Tomatoes:** Better volume and good quality crossing through all major borders this week.
- **Cherry Tomatoes: ESCALATED** Supply remains light this this week out of Mexico and quality is mixed. No pro rates expected at this time
- **Grape Tomato Medley:** Excellent volume and quality crossing through McAllen.

California

- **Roma & Round Tomatoes: ESCALATED** We continue to see growers harvesting daily round and roma tomatoes out of the Northern California and quality can vary by region. We are seeing a few more quality issues on vine ripens out of Southern California this week, mainly caused by heat related pressure. We are working with the grower to clean this up but going to struggle for a few more weeks.

APPLES & PEARS

Apples: WATCH LIST Granny smith apples remain tight, especially on the smaller sizes. East coast growers will have minimal availability through May. Import apples will start arriving at the end of this month on the east coast.

Pears: **EXTREME ON SMALL SIZES** Small pears will remain tight through August. Imports are available on the east coast.

Peaches: Yellow and white flesh available out of California and yellow flesh available out of South Carolina, New Jersey and NE Atlantic.

Nectarines: Yellow and white flesh are available out of California

Cherries: Done for the season

Plums: Late season Plum varieties still available.

Kiwi Fruit: Steady supply available on both coasts. Californian and Italian Haywards are available.