

Weekly Market Review

November 5, 2021

Overview

Most items will be tight going through this transition, (please see “Transition Schedule” attachment within the Market Report email). The avocado market continues to see stronger numbers on mid to smaller sizes this week and has tightened up on larger sized fruit. We anticipate promotable volume to continue in the forecast from this Aventajada crop. Tomato production is slowly improving with California completed and Florida slowly ramping up. We anticipate gradual improvement out of the southeast over the next two weeks while Mexico continues to produce decent numbers, but the tomato market will remain volatile through the Thanksgiving holiday. South Georgia will remain strong on all dry veg and beginning to see some volume available out of Florida. Nogales is continuing to open up with squash and cucumber availability. West coast summer/fall crops are mostly done, and we should also see a few transition crops (green bells, beans & corn) begin in Coachella over the next week. Chile pepper market is extremely short due to transition a GAP and quality issues is mainland Mexico (jalapeno, serrano pepper, tomatillos, poblanos and all other hot peppers out of Mexico are impacted).

Market Alert

- Avocados – **ESCALATED**
- Bananas – **ESCALATED**
- Bell Peppers (Green) – **ESCALATED**
- Broccoli & Broccoli Florets – **ESCALATED**
- Brussel Sprouts – **ESCALATED**
- Cabbage (Green) – **ESCALATED**
- Cauliflower – **ESCALATED**
- Carrots (Jumbo) – **ESCALATED**
- Chili Peppers (All varieties) – **ESCALATED**
- Corn - **ESCALATED**
- Eggplant - **ESCALATED**
- Green Beans – **ESCALATED**
- Garlic – **EXTREME**
- Ginger – **EXTREME**
- Honeydew – **EXTREME**
- Lettuce (Green Leaf) – **ESCALATED**
- Lettuce (Iceberg) – **EXTREME**
- Lettuce (Romaine Hearts & Romaine) – **ESCALATED**
- Mushrooms - **ESCALATED**
- Pineapples – **ESCALATED**
- Spinach - **ESCALATED**
- Tomatoes East & West **ESCALATED**

WATCH LIST

- Bell Pepper (Red and Yellow)
- Celery
- Green Onions
- Napa
- Strawberries
- Sugar Snap and Snow Peas








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. 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%. 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 11/4 68° 53°F  Partly Cloudy	Fri 11/5 72° 52°F  Partly Cloudy	Sat 11/6 68° 52°F  Sunny	Sun 11/7 64° 52°F  Partly Cloudy	Mon 11/8 64° 50°F  Partly Cloudy	Tue 11/9 64° 53°F  Partly Cloudy	Wed 11/10 67° 54°F  Partly Cloudy
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FRESNO, CA:

Thu 11/4 73° 49°F  Mostly Sunny	Fri 11/5 72° 48°F  Partly Cloudy	Sat 11/6 71° 50°F  Partly Cloudy	Sun 11/7 66° 49°F  Partly Cloudy	Mon 11/8 63° 49°F  Partly Cloudy	Tue 11/9 60° 50°F  AM Showers	Wed 11/10 63° 48°F  Partly Cloudy
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ADEL, GA

Thu 11/4 68° 48°F  Mostly Cloudy	Fri 11/5 59° 45°F  Showers	Sat 11/6 61° 43°F  Partly Cloudy	Sun 11/7 65° 42°F  Sunny	Mon 11/8 68° 43°F  Sunny	Tue 11/9 70° 45°F  Mostly Sunny	Wed 11/10 72° 50°F  Partly Cloudy
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PALMETTO, FL

Thu 11/4 80° 66°F  Cloudy	Fri 11/5 75° 64°F  Thunderstorms	Sat 11/6 73° 60°F  AM Showers	Sun 11/7 73° 54°F  Partly Cloudy	Mon 11/8 74° 56°F  Sunny	Tue 11/9 78° 60°F  Sunny	Wed 11/10 80° 63°F  Partly Cloudy
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JALISCO, MX:

Thu 11/4 83° 58°F  Mostly Sunny	Fri 11/5 84° 60°F  Mostly Sunny	Sat 11/6 85° 60°F  Mostly Sunny	Sun 11/7 86° 59°F  Mostly Sunny	Mon 11/8 84° 57°F  Partly Cloudy	Tue 11/9 83° 57°F  Partly Cloudy	Wed 11/10 82° 55°F  Partly Cloudy
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SALINAS, CA:

Thu 11/4 70° 48°F  AM Clouds/PM	Fri 11/5 70° 46°F  Partly Cloudy	Sat 11/6 70° 50°F  Partly Cloudy	Sun 11/7 64° 48°F  Partly Cloudy	Mon 11/8 62° 49°F  Mostly Cloudy	Tue 11/9 61° 52°F  Showers	Wed 11/10 64° 48°F  Partly Cloudy
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YUMA, AZ:

Thu 11/4	Fri 11/5	Sat 11/6	Sun 11/7	Mon 11/8	Tue 11/9	Wed 11/10
92° 61°F	92° 59°F	91° 59°F	88° 59°F	82° 56°F	81° 56°F	80° 58°F
						
Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Mostly Sunny	Sunny

Good Buys

Commodity	Market Update	Produce Expert Tip
Cucumbers	Good supply available in South Georgia and Florida. In the west, good supply loading in Nogales, and McAllen.	Looking for a simple, fresh salad or side dish for any meal? Slice up cucumbers and red onion and mix with white vinegar, sugar and fresh dill. Mix up and enjoy!

Fruits & Vegetables

Avocados: ESCALATED Market pricing was fairly steady last week; we saw some increases on big fruit, but small fruit seemed mostly unaffected by the ‘rain market’. With the holiday in Mexico, we are seeing a stable market this week as one day of lost harvest has an impact on market pricing. If harvest remains strong, we may see decreased field pricing later in the week, but that fruit won’t cross into the U.S. until early next week. The size curve percentages remain mostly unchanged – the crop continues to be strong on 60s and smaller while large fruit remains tight. October ended with the market higher than anticipated, and November is starting higher than the previous 6 years. Most believe this market is going to come off, but when & how much is remained to be seen - currently there is high demand in the field matched with increased demand this side of the border.

Bananas: ESCALATED Banana quality and availability are good. However, cost will be going up due to several inflationary pressures ranging from labor, sea cargo rates, corrugate and liners.

Pineapples: ESCALATED While pineapple volume is where we would like it to be this time of year, we are experiencing a higher cost to go to market. We are seeing increases due to several inflationary pressures ranging from labor, sea cargo rates, corrugate and liners. Quality and taste profile are great.

Grapes: Grape growers have resumed harvest and the windy cool weather following last week’s rain helped minimize the negative impact on grape supply. Growers focused their harvest and recovery efforts on the best grapes leaving smaller and lighter color red grapes behind and we saw the lower end markets firming up. Most of the CA harvest will be completed by the end of the mid November. The weather forecast for Chile does not predict any severe or crop altering weather systems. There is very low chance of precipitation forecasted at this time. Chile looks on track to start 5-7 days earlier than last season and the Central and Southern growing areas appear to be more of a normal start dates as opposed to the early start dates forecasted out of the Northern growing areas.

Berries

Strawberries: After last week's rain event, we saw a decrease in production. The rain event also triggered Watsonville and Salinas to be pulled out of production since both districts received significant higher amounts of rainfall. After field evaluations, Oxnard and Santa Maria observed minimal fruit damage. With the favorable weather next week and strong volumes out of Oxnard, we expect overall volumes to

rebound. Oxnard is expected to peak in 2-3 weeks. Central Mexico volumes are expected to increase gradually in the coming weeks as rain and cool temperatures are impacting production.

Blackberries: Rain events in California and Central Mexico disrupted the harvest. The impact was higher in California with minimal to no harvest on Monday. Category 1 hurricane Rick had a slight impact on the harvest in Central Mexico. We expect supply to increase gradually week over week during the next 3-4 weeks. Central Mexico will reach peak volumes in late November/early December.

Raspberries: Volume will continue to increase over the next few weeks as we approach the Central Mexico peak, expecting to reach peak volume in early November. California volume is decreasing fast over the next few weeks, as the Watsonville/Salinas regions come to their final weeks of production. Oxnard will continue to produce steady volume through November and conventional volume will then decrease as we approach December.

Blueberries: Mexico production continues to increase week moving forward. Baja production will remain stable for the next few weeks. Volume from Peru is expected to increase through the month of November.

California

Citrus

Oranges: Navels have started. Plenty of small fruit available, mostly fancy grade.

Lemons: District 3 lemons have started, and quality is looking good. Some imported lemons will be available for the next few weeks as ships continue to be unloaded at the port of CA. Mexican lemons will be available for the next few weeks as well.

Limes: Market prices are mixed this week; quality has been looking much better.

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

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

West Coast Lettuce

Butter Lettuce: Overall volume and quality looks to be steady this week.

Green Leaf: **ESCALATED** Salinas green leaf production continues to decrease weekly. Quality is fair with a good green color, good texture, and slightly lighter in weight. Pricing continues to strengthen.

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

Romaine & Romaine Hearts: **ESCALATED** Romaine and romaine heart production continues 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. With the supply on iceberg lettuce being so short, overall demand on romaine is stronger, with slightly better movement on all romaine.

Iceberg Lettuce: **EXTREME** The market is very active and will continue to have light supply for the upcoming weeks as we transition to Yuma. Labor, weather, and quality continues to be a daily issue.

Eastern and Western Vegetables

Green Bell Pepper: ESCALATED Supply will be lighter this week in South Georgia, but markets are down from last week a bit as we see volume ramping up out of Florida. Transition will be on the horizon soon. In the west, production is done out of the Central and intercoastal valleys, our Southern Production in Oxnard will be lighter this week and seeing production ramp up out of the desert this week as well. We should see a few light crossings in Nogales over the next 10 days as well. Quality is outstanding and we are not expecting any pro-rates on our programs at this time.

Red Bell Pepper: WATCH LIST Tighter supply this week available out of California, Mexico, and Canada. Quality remains good.

Yellow Bell Pepper: WATCH LIST Tighter supply this week available out of California, Mexico, and Canada. Quality remains good.

Mini Sweet Pepper: Lighter supply available this week.

Mixed Chili Pepper (All Varieties): ESCALATED Lighter supply out of South Georgia this week on long hots, poblano, cubanelle and Jalapeno and quality is outstanding; we are starting to see availability out of Florida as well. In McAllen, supply will remain tight this week on all varieties, jalapeno and serrano remain extremely tight as growers transition to newer fields. 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. West coast supply is done out of California and Baja is extremely light due to cold weather. We should see new crop available out of Nogales in 10 to 14 days.

Eggplant: ESCALATED Supply out of South Georgia will be lighter this week due to cooler weather. In the west, we are seeing some light numbers available in the desert this week and Nogales will see light number and improved crossing this week or next.

Slicer Cucumbers: Good supply available in South Georgia and Florida. In the west, good supply loading in Nogales, and McAllen.

English Cucumbers: Supply and quality are good.

Pickles: Good supply available out of Florida. We are seeing improving volume out of Mexico as well. Quality is very nice.

Green Beans: ESCALATED Markets remain firm and supply lighter this week out of Georgia and South Florida. IN the west we are seeing volume ramp up out of the desert and should see a few crossings out of Nogales late next week. Quality will be marginal in the east and good in the west. We do not expect pro-rates, however, we recommend subbing to French beans or soft squash if needed.

French Beans: Volume remains stable, and quality is strong, but pricing is higher this week due to increased demand.

Zucchini/Yellow Squash: Fall squash out of South Georgia and Florida is looking beautiful and volume should remain stable through the remainder of the month. In the west, excellent supply out of Nogales. Quality out of Mexico is outstanding

Herbs

Herb supply remains steady. **Marjoram**, **Savory** and **Lemon Thyme** are all available this week and should be steady going forward.

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	MEXICO
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

Melons

Cantaloupe: WATCH LIST Cantaloupe availability remains in a demand exceeds supply scenario. A combination of fewer melon growers in the region and virus issues in the Yuma area have contributed to this situation. The Arizona fall period is always extremely volatile so this year has been no different. With offshore production beginning by at least 11/15 there is relief in sight, but we will have another 10-14

challenging days. With an empty melon pipeline, we anticipate markets to remain strong until we move into the week of Thanksgiving.

Honeydew: **ESCALATED** Honeydew production remains short on domestically grown melons, but good supply of Mexican production has been crossing through Nogales. Sizing continues to be mostly 5s and larger with some 6s showing available. Very few 8s are coming to market.

Watermelon: Lighter supply available this week crossing through Nogales. Demand is flat and quality is marginal.

Mixed Vegetables

Artichokes: Volume continues to be low this week, we expect to harvest 3 days, and most of what we are packing are 12s. Quality is excellent, prices are higher, and we expect volume to remain low for another week.

Arugula: Supply and quality are good this week.

Asparagus: Supply and quality are very good, and pricing continues to trend steady to slightly lower.

Bok Choy: Supply is about steady this week, with slightly lower demand. Pricing is steady.

Broccoli/Broccoli Florets: **ESCALATED** We have seen a slight increase in supply on broccoli with lighter demand although we could see market strengthen as we head into the holidays and transition to Yuma. Quality is good.

Brussels Sprouts: **ESCALATED** Overall sprout volume looks to be normal and on track for the coming week. Quality is good with occasional discoloration and insect injury. Pre-booking this week for Thanksgiving is strongly recommended.

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: **ESCALATED** Supply is expected to be slightly lighter than they have been in previous weeks. Overall quality and appearance should be very nice.

Celery: Good demand on celery continues this week as demand for the holidays increase. Good supply on the west coast. Quality is good and the market is higher in Salinas. Oxnard has started.

Corn: **ESCALATED** Corn is limited out of South Georgia, quality is mixed, and FOB prices are high. Very little supply in the west.

Cilantro: Cilantro volume is good this week with good quality and appearance.

Fennel: We will have good supply on fennel this week with extra volume to move. Sizing and quality remain strong – we will see a majority of 18/24ct available this week. All production will be coming out of Salinas.

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

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

Green Cabbage: ESCALATED Supply continues to be light although quality remains consistent with sizing and overall appearance.

Green Onions: WATCH LIST Quality is good this week. Market has strengthened as we head into the holidays with lighter supply from previous warm weather events in the growing areas of Mexico.

Jicama: Steady supply available crossing through McAllen.

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

Mushrooms: ESCALATED Quality is good, although supply is extremely short and market is higher primarily due to a lack of labor, shortages in component of growing such as peat moss. We do expect this trend to continue through the first of the year.

Napa Cabbage: WATCH LIST Supply is almost steady this week, demand continues to be strong and market prices remain elevated.

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

Rapini: We will have good supply this week with extra product available to sell. Quality remains strong overall.

Red Cabbage: Supply is light although quality remains consistent with sizing and overall appearance.

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): ESCALATED Quality concerns are fringe burn, insect damage and possible mildew.

Spinach (Baby): ESCALATED Quality concerns of fringe burn, insect damage and possible mildew.

Spring Mix: Supply is good and, but we are seeing quality concerns such as sclerotinia, fringe burn, insect damage, and mildew.

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 limited Colossal and Super Colossals. The market continues to stay strong on yellow jumbos and larger, and all sizes of reds and whites. Movement has slowed these past two weeks, likely due to the onion recall on Mexican onions that shipped this past summer even though these onions are more than likely entirely out of the supply chain, the national stage of the recall has given consumers some pause. This has allowed growers to have a few quiet weeks to extend their crop and cover contract commitments later into the spring. Since the recalled onions were isolated to Mexican product, we are already seeing many multi-unit national accounts change their sourcing guidelines to omit Mexican grown onions. Typically, Mexican onions can drastically change the supply situation, and pressure pricing down. However, if major onion users will no longer allow Mexican product, we may see the domestic supply increase in pricing, regardless of how many the import into the U.S. Labor shortages are continuing to present production challenges in Idaho, Oregon, and Washington, particularly on heavy volumes of consumer packed onions. 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. While there are rumblings that Mexico and other offshore onion growing regions have larger than normal crops that they will be importing into the U.S. come January, it may not have its usual affect this season. 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. Unfortunately, there does not appear to be any relief in freight costs in the near-term future.

Potatoes:

The potato market continues to move back up on all sizes at the moment, rather than just smaller size potatoes as it previously had been. While we had previously believed this would be a short-term supply situation where the size profile would become more balanced, the Norkotah crop does appear to be remaining on the larger end of the size profile for the foreseeable future. This is causing 80ct and smaller potatoes, as well as #2 potatoes, to get progressively tighter each week. The concern regarding as much as 30% or more of the crop remain alive and well, and we are feeling it already. This is rather uncharted territory as the market usually begins to get plentiful on cartons this time of year as shippers pack heavy retail bags to meet Thanksgiving and holiday demand. Additionally, processors continue to put pressure on the fresh crop as they are offering record prices for bulk product. Growers are then faced with a difficult decision about whether to sell their crop to processors or support the fresh market. The only way the fresh market will keep up, is if returns back to the farms are comparable to what they are being offered. The heat this past summer is still believed to have affected the Burbanks more than the Norkotahs, so we are not very optimistic of relief until likely next year's crop. 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 will see better volume out of Ruskin and Palmetto over the next 10 days, but volume remains lighter than a normal season. We should see much improved quality as well and do not anticipate any pro-rates currently on roma tomatoes.
- **Romas Tomatoes: ESCALATED** We will see better volume out of Ruskin and Palmetto over the next 10 days, but volume remains lighter than a normal season. We should see much improved quality as well and do not anticipate any pro-rates currently on roma tomatoes.
- **Grape Tomatoes: ESCALATED** We will see volume continue to improve over the next 10 days mainly due to the weather bringing the crop along. Quality has improved as well.
- **Cherry Tomatoes: ESCALATED** We will see volume and quality improve over the next several weeks. We do not anticipate any pro-rates; however, we recommend grape tomatoes as a reliable sub if necessary.
- **Organic Tomatoes: EXTREME** Supply remains limited.

Mexico

- **Round Tomatoes: ESCALATED** 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** Markets remain mixed this week despite a bit more volume crossing through Otay and McAllen. Overall quality is very nice on rounds, and we do not anticipate any pro-rates on contracts currently
- **Grape Tomatoes:** Good volume and quality available.
- **Cherry Tomatoes: ESCALATED** Supply remains light this week out of Mexico and quality is mixed. No prorates expected at this time, however, should we do see any we recommend a sub to grape tomatoes.
- **Grape Tomato Medley:** Excellent volume and quality crossing through McAllen.

California

- **Roma & Round Tomatoes:** Done for the season.

APPLES & PEARS

Apples: West coast new crop apples are being packed; however small sizes remain fairly tight. Washington exports a substantial amount to Mexico which has drove the price up over the last few weeks on many varieties. East coast apples are available as well. Market price remains firm on small fruit as local schools take most of the volume.

Pears: This year's pear crop was down significantly, with mostly larger fruit available. Growers are trying to drag out supplies as best as possible until new crop starts next August.