

Weekly Market Review September 30, 2022

Overview

Colored bell peppers continue to be a challenge due to low production and insect pressure causing quality issues. Volume out of the east is gradually improving as newer districts begin to ramp up. In the west, Hurricane Kay has impacted roma supply crossing through Otay, while California deals with the impact of heat. The long-term effects to the California season will ultimately be continued short supply. Mexican rounds are in good production crossing through Texas from Central Mexico. Good volume available on soft squash and new crop has ramped up out of South Georgia this week then followed by cucumber and bell pepper over the next 7 to 10 days. Current demand on cucumbers is strong due to weather and we expect to see active markets through September, then transition to Nogales mid-October.

Tomato markets are sluggish in general for snacking tomatoes and round tomatoes however this will be short lived as romas are very tight on a tow pronged front; a shortfall out of Central Mexico and loss of cross in Baja due to Hurricane Kay are causing major shortages across the country and expect tight markets through Mid-October. California tomatoes will be ending prematurely as well due to a combination weather related impacts, smaller crops and poor yield which will only continue to put upward pressure pricing until we can ramp up production in newer growing regions.

With regards to east coast veg its too soon to assess the impacts of Hurricane Ian. In the Salinas Valley, Growers continue to struggle with quality and supplies due to recent weather conditions and increased disease pressure. Markets are high and all crops are affected. We expect it to last throughout the remainder of the Salinas season.



Hurricane Ian

Hurricane Ian made landfall in West Florida with record breaking storm surge, wind, and rain, this will certainly impact the growing regions of Florida and potentially Georgia. It's far too early to assess the impacts at this time but will do so as soon as possible. We will keep you posted as we hear from our grower-partners, but this storm will impact the supply of Southeastern tomatoes as well as dry vegetables, and citrus crops throughout the region. Please keep the grower community in your thoughts during these trying times.

Market Alert

- Asparagus – **ESCALATED (Large, Extra Large, & Jumbo)**
- Bell Peppers (Red and Yellow) – **ESCALATED**
- Broccoli Crowns - **ESCALATED**
- Cabbage (Green & Red) – **ESCALATED**
- Carrots (Jumbo) – **ESCALATED**
- Cauliflower – **ESCALATED**
- Cilantro – **ESCALATED**
- Cucumbers (Slicer & English) - **ESCALATED**
- French Beans - **ESCALATED**
- Garlic – **EXTREME**
- Ginger – **EXTREME**
- Green Onions – **EXTREME**
- Lettuce (Iceberg, Romaine/Romaine Hearts & Green Leaf, Boston) – **ESCALATED**
- Potatoes (40s & 50s) – **EXTREME**
- Limes - **ESCALATED**
- Melons - Cantaloupe and Honeydew - **ESCALATED**
- Mushrooms – **ESCALATED**

- Strawberries – **ESCALATED**
- Sugar Snap Peas – **ESCALATED**

- Tomatoes (Roma) - **ESCALATED**
- Oranges – **ESCALATED**

WATCH LIST

- Corn
- Green Beans
- Seedless & Mini Seedless Watermelon
- Snow Peas
- Sugar Snap Peas
- Hot Peppers

Transportation

Fuel has leveled off over the past 2 months after the quick increase through Q2 this year. It is difficult to forecast with many changing factors, but most experts expect to see fuel rates increase slowly through the next couple of months. The fuel market is very delicate at this time, and many factors can change that forecasting quickly.

Weather

OXNARD, CA:

| Thu 9/29 | Fri 9/30 | Sat 10/1 | Sun 10/2 | Mon 10/3 | Tue 10/4 | Wed 10/5 | Thu 10/6 |
|---|---|---|---|---|--|---|---|
| 74° 59°F | 72° 59°F | 72° 58°F | 71° 58°F | 74° 59°F | 75° 60°F | 76° 61°F | 75° 61°F |
|  |  |  |  |  |  |  |  |
| Mostly Sunny | Mostly Sunny | Mostly Sunny | Partly Cloudy | Sunny | Sunny | Mostly Sunny | Mostly Sunny |

HENDERSONVILLE, N.C.

| Thu 9/29 | Fri 9/30 | Sat 10/1 | Sun 10/2 | Mon 10/3 | Tue 10/4 | Wed 10/5 | Thu 10/6 |
|---|---|---|---|---|--|---|---|
| 65° 48°F | 57° 50°F | 60° 51°F | 61° 50°F | 61° 46°F | 65° 43°F | 70° 44°F | 72° 46°F |
|  |  |  |  |  |  |  |  |
| Mostly Sunny | Rain | Rain | Showers | Few Showers | Partly Cloudy | Partly Cloudy | Mostly Sunny |

MOULTRIE, GA

| Thu 9/29 | Fri 9/30 | Sat 10/1 | Sun 10/2 | Mon 10/3 | Tue 10/4 | Wed 10/5 | Thu 10/6 |
|---|---|---|---|---|--|---|---|
| 72° 58°F | 75° 54°F | 83° 56°F | 82° 58°F | 78° 55°F | 79° 54°F | 81° 55°F | 84° 56°F |
|  |  |  |  |  |  |  |  |
| Partly Cloudy/Wind | Partly Cloudy | Sunny | Sunny | Partly Cloudy | Mostly Sunny | Partly Cloudy | Partly Cloudy |

JALISCO, MX:

| Thu 9/29 | Fri 9/30 | Sat 10/1 | Sun 10/2 | Mon 10/3 | Tue 10/4 | Wed 10/5 | Thu 10/6 |
|---|---|---|---|---|--|---|---|
| 82° 63°F | 80° 63°F | 76° 63°F | 76° 62°F | 76° 61°F | 76° 62°F | 76° 61°F | 80° 62°F |
|  |  |  |  |  |  |  |  |
| PM Thunderstorms | PM Thunderstorms | Thunderstorms | PM Thunderstorms | Thunderstorms | Thunderstorms | Thunderstorms | PM Thunderstorms |

FRESNO, CA:

| | | | | | | | |
|--|--|--|--|--|---|--|--|
| Thu 9/29 92° 61°F  Partly Cloudy | Fri 9/30 93° 61°F  Sunny | Sat 10/1 94° 59°F  Sunny | Sun 10/2 91° 59°F  Sunny | Mon 10/3 92° 60°F  Sunny | Tue 10/4 93° 62°F  Sunny | Wed 10/5 92° 62°F  Sunny | Thu 10/6 91° 61°F  Sunny |
|--|--|--|--|--|---|--|--|

SALINAS, CA

| | | | | | | | |
|--|--|---|--|--|---|--|--|
| Thu 9/29 73° 55°F  Partly Cloudy | Fri 9/30 76° 56°F  Sunny | Sat 10/1 70° 56°F  Mostly Sunny | Sun 10/2 69° 55°F  Partly Cloudy | Mon 10/3 72° 54°F  Partly Cloudy | Tue 10/4 75° 56°F  Partly Cloudy | Wed 10/5 72° 57°F  Partly Cloudy | Thu 10/6 73° 56°F  Partly Cloudy |
|--|--|---|--|--|---|--|--|

Good Buys

| Commodity | Market Update | Expert Tip |
|-----------|--|---|
| Pineapple | Supply improving and expected to be stable. Quality is good. | Pineapple and fennel may not seem like the perfect pairing, but they are the most amazing mix of spicy and sweet. For a new type of salad, thinly slice a fennel bulb, dice a fresh pineapple, add some green onions, diced avocado, and arugula for a delicious fresh spicy and sweet salad! |
| Fennel | Good supply continues with very good quality | |

Fruits & Vegetables

Avocados: Last week closed out at 52.4 Mil lbs. for the U.S. – a continuation of steady supply and Mexico regaining market share as Peru volume dropped 40%. Mexico continues to harvest healthy volumes and is accountable for 86% of the U.S. inventory, followed by Peru at 13%, and California and Colombia combined at around 1%. Mexico is transitioning into the next crop Aventajada, and the size curve is skewing smaller again. With California and Peru's participation in the market dwindling and wrapping up. Mexico will be the Origin feeding the U.S. market until Colombia's Principal crop comes on. Colombia has reported a lot of rain this season, which can cause the dry matter/maturity to struggle to meet U.S. standards. USDA pricing is about the same as the overall average. However, the pricing spread between sizes is normalizing, with bigger fruit priced higher than smaller sizes.

Bananas: Good volume and quality will be available.

Pineapples: Supply improving and expected to be stable and quality is good.

Table Grapes: The Central Valley received some much-needed rain brought on by Hurricane Kay earlier this month. Growers in the Central San Joaquin Valley is projecting they will be short by 100 million boxes due to weather related pressures this season, however it will still be another few weeks before we see a clearer picture of how this will impact the late season supply. Short-term we continue to see steady markets and stable supply continue to be the norm. Currently we will continue to see good quality fruit hanging on the vines and quality is still good.

Berries

Strawberries: **ESCALATED** Last week's rain came in much heavier than forecast. These rain events disrupted the picking schedules and caused considerable damage to fruit. Harvest resumed at the

end of last week, and the volumes were low as growers stripped the plants. Santa Maria's fall crop production is increasing, with a peak estimated for the first week of October. Production out of Watsonville/Salinas is decreasing and will continue to do so through its seasonal end in October. Oxnard has been tracking ahead of budget, but the increment wasn't enough to cover other regions' shortages. The overall quality is fair to good, with some soft-skinned, deformed fruit, overripe, and occasional pin rot on shoulders because of the recent heat wave and rain. The shape, size, and color are good, and crews are working to keep packs clean.

Blackberries: Supply is expected to remain low until mid-late October. The shortfall is driven by the combination of the heat and rain events received during the past several weeks. Growers thought they would escape without any damage, but their supply is tracking lower than expected through the USA regions. Central Mexico is starting its season; however, the volume won't offset the USA production until mid to late October. Quality is fair due to inconsistent weather conditions.

Raspberries: Volume will continue to increase week over week until we reach our fall peak in October. Watsonville, Santa Maria, BC, Baja, and Quebec are post-peak and will be down-trending for the remainder of the year. Oxnard has one more week before down-trending for the remainder of the year and Central Mexico will be the lion's share of the total volume by the end of October/early November.

Blueberries: The Pacific Northwest volume will continue to decrease quickly, with most areas finishing production this week. British Columbia production is increasing, with peak volumes starting this week. Mexico's production will continue to ramp up quickly and Baja volume will continue to increase through the new year. Peruvian volumes will continue to increase.

California

Citrus

Oranges: **ESCALATED** 2022's CA Valencia crop volume is down compared to last year and as we near the end of the season, shippers are taking steps they thought would help to extend the season and smoothly transition to CA Navel season. Unfortunately, with lighter volume due to water restrictions, labor shortages and record high temperatures, many shippers are seeing they may not have enough fruit to get through to the beginning of the Navel season. We are facing potential "gaps" between seasons as shippers are experiencing lower pack outs, especially on small fruit (88's, 113's, 138's) as fruit quality has been impacted, reducing the number of cartons they are able to pack. We originally felt that Florida could potentially fill in the gap but the Hurricane that has moved through Florida this week has done extensive damage to the Citrus crops.

Lemons: No real changes on Lemons as Lemons continue to tighten up now that D1 lemons (Central Valley) have finished for the season. D2 (coastal region) has had very little fancy fruit, very heavy choice, and standards, but some rough fruit this season. D2 is yellow, soft, and has heavy scars – this is normal for D2 lemons, and growers will grade as hard as they can and work through it. Size structure peaking at 200/235F. As is typical this time of year, as domestic supply of lemons starts to wind down, some shippers will supplement with Chilean and Mexican fruit.

Limes: **ESCALATED** Although pricing is still escalated, the market continues to lose momentum as costs decline in Mexico. Coloring and overall shelf life is beginning to improve as the new crop is harvested. However, conditional defects in the form of styler, breakdown, and oil spots continue to impact the fruit due to inclement weather, including consistent rain events paired with high

temperatures and humidity. We should see total improvement within the next few weeks and overall availability will ramp up in October, which is expected to continue through November. The crop is currently peaking on small fruit – large sizes are scarce.

Grapefruit: Ruby grapefruit is now available, and size is peaking on 32s and larger. Fancy and all small sizes (36s and smaller) are tight. Texas is expected to start very late and due to the current Hurricane moving through Florida, expect severe damage to the crop. We will have more updates as we receive more information from shippers

Imports/Specialties: Imported clementines and kiwi are available.

West Coast Lettuce

Iceberg Lettuce: ESCALATED Supply continues to be light and quality is medium due to massive changes in the weather and virus/diseases. The market has been very active and the forecast is for the market continues at current levels with a possibility of even higher prices if demand increases.

Romaine, Romaine Hearts: ESCALATED Romaine and romaine heart supply is light and quality is fair as plants have suffered from extremely warm temperatures in recent weeks and experiencing various quality defects, reducing yields. All shippers are projecting additional quality issues to pop up, especially with warm weather behind last week's rain showers.

Green Leaf, Red Leaf, Butter: ESCALATED Production in Salinas is extremely light, and quality is fair as Virus's and disease pressure continues to impact overall yields. Growers are also experiencing some wind/fringe burn with occasional seeder. Markets and demand remain very strong, and supply continues to decrease. Growers are expecting light supply with a very strong market to continue through the remainder of the Salinas season.

Eastern and Western Vegetables

Green Bell Pepper: Supply is lighter this week and overall quality has been good out of the west. Markets are tighter in the east and should start South Georgia over the next 10 days while in the west we should transition to the desert in 3 weeks.

Red Bell Pepper: ESCALATED Markets are holding strong as supply remains limited this week due to heat and insect pressure causing quality issues in the fields

Yellow Bell Pepper: ESCALATED Markets are holding strong as supply remains limited this week due to heat and insect pressure causing quality issues in the fields.

Mini Sweet Pepper: Supply is lighter this week and quality is outstanding.

Mixed Chili Pepper: WATCH LIST In the east, we continue to see light volume on jalapenos and very short on all other varieties. In McAllen, volume is lighter on all varieties and seeing quality issues on the tomatillos. We are seeing quality issues and low production from Coahuila and Chihuahua and California is about done for the season. Markets will remain firm until we start seeing crossings in Nogales next month.

Eggplant: Normal supply and good quality available.

Slicer Cucumbers: ESCALATED Markets remain firm, and supply has flipped. There is better supply available in the east as production remains strong in the Carolinas and Michigan. South Georgia should ramp up over the next 10 days and in the west, we are certain to expect short supply crossing through Otay due to the impacts of Hurricane Kay while demand is strong loading in Texas. Overall quality is mixed and there is a large spread in price based on quality this week. We should see some relief through Nogales in 2-3 weeks.

English Cucumbers: ESCALATED Higher demand and very light supply has spiked the markets and will remain firm for the next several weeks.

Pickles: Lighter volume available this week out of Central Mexico, Canada, and Michigan and quality is fair.

Green Beans: WATCH LIST Production will begin to slow down out of the North and transition south and quality will decline. Light supply out of the west; availability will continue to be day to day with fair quality. Its certain we will see supply issues in the east and markets spike due to Hurricane Ian

French Beans: ESCALATED Demand exceeds supply out of Mexico and Guatemala. Quality is fair to good; relief out of Mexico has now been pushed back for the next three weeks. Guatemala will continue to be light for the next 3 -4 weeks due to rainfall and quality issues.

Zucchini/Yellow Squash: In California, extreme heat has impacted the fall crop and Hurricane Kay will impact Baja Production. We are seeing some light crossings in Nogales this week. In the east, good supply out of North Carolina, Michigan, and South Georgia. Quality is very nice in the east.

Herbs

Supply continues to pick up, but there remain some quality issues and we look for this to continue for the next 5-7 days. Yields remain down as growers trim the basil, and the labor hours have increased. BASIL is the only fresh herb that seems to be affected so far, and supply on all the other herbs remain steady. CHERVIL and MARJORAM continue to be very limited in supply.

| HERB | SUPPLY | QUALITY | COUNTRY OF ORIGIN |
|------------|---------|----------|-------------------|
| Arugula | Steady | Steady | USA |
| Basil | Steady | Steady | MEXICO |
| Opal Basil | Steady | Steady | USA/MEXICO |
| Thai Basil | Steady | Steady | MEXICO |
| Bay Leaves | Steady | Steady | COLOMBIA |
| Chervil | Limited | Marginal | USA |
| Chives | Steady | Steady | MEXICO |
| Cilantro | Steady | Steady | USA |
| Dill | Steady | Steady | USA |

| | | | |
|-----------------|---------|-----------|--------|
| Epazote | Steady | Steady | MEXICO |
| Lemongrass | Steady | Steady | USA |
| Marjoram | Limited | Flowering | MEXICO |
| Mint | Steady | Steady | USA |
| Oregano | Limited | Flowering | MEXICO |
| Italian Parsley | Steady | Steady | USA |
| Rosemary | Steady | Steady | MEXICO |
| Sage | Steady | Steady | MEXICO |
| Savory | Steady | Steady | USA |
| Sorrel | Steady | Steady | USA |
| Tarragon | Steady | Steady | MEXICO |
| Thyme | Steady | Steady | USA |
| Lavender | Steady | Steady | USA |
| Lemon Thyme | Steady | Steady | USA |
| Lime Leaves | Steady | Steady | USA |

Melons

Cantaloupe: ESCALATED The cantaloupe deal remains very limited following the weather that hit the region last week as many California grower/shippers are in a seasonal decline. We anticipate supply and markets to remain tight for the next few weeks until the desert deal begins in Arizona but even then, supply will be lighter than they have been in the past. Sizing for cantaloupe has been close to even between 9/12s with some 15s and very few 9Js being harvested. Shorter daylight hours and cooler temperatures equate to this sizing profile while possibly leaning more to 12-15s over the next 7-10 days.

Honeydew: ESCALATED Honeydews continue to be in a very limited position with all sizes holding at record pricing levels for this time of year. We do not anticipate any relief on the honeydew situation until the Mexican crossings pick up which should be the second week of October. The recent shortage of honeydew is being attributed to the lack of a northern growing deal due to a zero-water allocation. Not being able to plant in the Sacramento region drastically affected normal production for the month of September.

Watermelon: WATCH LIST Overall quality is very nice, strong demand and light volume are keeping markets firm this week. Fortunately, there are plenty of loading options out there from California to Michigan and Texas.

Mini Seedless Watermelon: WATCH LIST Extremely limited supply available this week mainly due to high demand and excessive heat.

Mixed Vegetables

Artichokes: Quality is very good, and supply will be lighter over the next several weeks.

Arugula: Supply and quality are good.

Asparagus: **ESCALATED (Large, Extra Large, & Jumbo)** Mexican production has increased this week and should continue to increase in the coming weeks. Peruvian production has also increased this week. We have started seeing bigger sizing from Mexico as production has improved on all sizes. Markets are less active this week on the smaller sizes and are still active on the bigger sizes.

Broccoli/Broccoli: **WATCH LIST** Current supply continue to be lighter; market remains active.

Brussels Sprouts: Expect another strong production week in the sprout category. Quality is generally good to excellent but there is occasional insect damage noted.

Carrots: **ESCALATED (Jumbo)** Supply on carrots are much improved and quality is "very good". Good supplies on all items although shippers continue with labor so supplies on Jumbo's continue to be a struggle.

Cauliflower: **ESCALATED** Current supply continues to be light, market is higher.

Celery: We will start to see lighter supplies going forward as growers are reporting some quality issues caused by the extreme hot weather. Look for market to strengthen as we move into October.

Cilantro: **ESCALATED** Cilantro supply is expected to be light as yields will be down due to the adverse weather in all growing areas.

Corn: **WATCH LIST** Supply is limited this week as some of the local deals mostly done for the season. Expect tighter markets in the east until mid-October after transition back to South Georgia. The west will remain firm and certainly be impacted by the heat; desert corn is about 4-6 weeks out. We will need to assess damage done to the crops in S. Georgia and Florida post hurricane Ian, but expect a spike.

Fennel: Good supply continues with very good quality

Garlic: **EXTREME** New crop California has started although domestic supply is very tight, and shippers are holding to averages. We expect this volatile market to continue through the summer.

Ginger: **EXTREME** Chinese supply will be very sporadic due to delays in unloading containers and inspecting at the ports. Pricing will be climbing daily.

Green Cabbage: **ESCALATED** Market is stronger due to lighter supply from the recent heat and insect pressure.

Green Onions: **EXTREME** We continue to see "EXTREMELY LIGHT SUPPLY" with most shippers heavily prorating. Due to the recent weather-related issues earlier this summer, the current situation will continue before we start to see any relief on supply and quality.

Jicama: Steady supply available crossing through McAllen.

Kale (Green): Supply is steady, quality is good.

Mushrooms: ESCALATED Quality is good despite supply being lighter than expected. We continue to see lack of labor, shortages in component of growing such as peat moss and other inflationary pressures. We expect to see this continue to be a challenge until some of the growing costs can get under control of this particularly labor intensive and cost sensitive item.

Napa Cabbage: Market continues to be very active as shippers continue to see the effects of the heat. Expect below average supply due to quality issues in the fields.

Parsley (Curly, Italian): Supplies are lighter with just average quality due to the heat and rain. Market is stronger.

Rapini: We continue to see good quality although supplies are lighter. Market is slightly stronger.

Red Cabbage: ESCALATED Although quality is good, we continue seeing lighter than normal supplies, market remains very active.

Snow Peas and Sugar Snaps: ESCALATED: We continue to see production and quality issues in Snow peas from Guatemala. Sugar snaps continue to be short due to the rain, but production should get better in early October. Volume and markets are steady out of the west, and quality is good.

Spinach (Bunched & Baby): Supply is good, quality is better than expected after the recent heat but expect to see some quality issues from the recent heat

Spring Mix: Supply is good, quality is better than expected but expect to see some quality issues from the recent heat.

Sweet Potatoes and Yams: There is plenty of availability across all sizes out of North Carolina with some good deals to be had on straight loads of #1's. There seem to be more potatoes available out of North Carolina compared to Mississippi who anticipate finishing the current crop just in time for new crop to be cured. We are also currently seeing a small gap with some specialty sweets like Red Garnets out of Livingston, CA. They expect to be back in with their new crop at the beginning of August.

Onions:

While supply has improved as demand has eased up this past week, the market remains elevated for this time of year. The market does have a 'softer feel' 'feel' overall, as essentially all growers are now shipping full steam ahead. That being said, the long-term optimism is still very much present amongst Northwest growers. Early fields are still yielding very poorly – as much as 60% of what they normally do. As has been reported previously, the crop is starting to look very similar to last season, where tonnage was down, and supply was short. Additionally, the sizing challenges we faced last year with colossal and super colossal onions appear to be repeating themselves again. Washington seems to be a little bit ahead of Idaho at this point, although they certainly will still have shortages on product too. The August NOA report showed that acreage is down from where it was last year throughout all growing regions in the country. This crop has the highest input costs of all time, and at

this point, it does appear as though the market will be strong throughout the year. Additionally, it has been reported that Holland is very shot on their own product. This is relevant as Holland supplies much of the world with onions. Trucks have begun to tighten up as well. This was generally expected as Labor Day is typically the beginning of the truck rate increase that generally continues into the Fourth Quarter.

Potatoes: EXTREME (40s & 50s)

The potato market continues to correct itself as growers continue through harvest. Demand was down this past week, which is no longer exceeding, or even meeting supply out of the field. Whereas the relief had previously been on 90ct and smaller potatoes over the last few weeks, we are now seeing that relief carry over into 60s/70s/80s as well. 40s/50s are holding. This is a strong indicator of what the long-term size profile and outlook on this crop is. It is not impossible that we see a situation where 40s/50s could have an unprecedented difference in price from where 70s and smaller are. Many growers fear that the influx of smaller sizes is directly related to poor yielding fields. While things may feel 'soft' at the moment in the market, there is still strong optimism for the long-term outlook. If the remainder of the Norkotahs continue to be this small, growers will have grave concerns about the Burbanks sizing up better, since Burbanks generally do run smaller than Norkotahs. The overall concern regarding total tonnage in the potato crop remain alive and well, and growers are optimistic that pricing levels will remain strong. Not only have potato growers been subject to the same inflationary overhead costs we are seeing in all industries, but potato acreage is significantly down in Idaho, and yields appear to be like last season. The processor demand has only heightened since last year, and as of this writing, the industry should expect a similar market to last season during the Spring and Summer months. Trucks have begun to tighten up as well. This was generally expected as Labor Day is typically the beginning of the truck rate increase that generally continues into the Fourth Quarter.

TOMATOES **East Coast**

- **Round and Roma Tomatoes: ESCALATED** Volume is steady this week out of the mountains of Tennessee and North Carolina. Markets will firm up but should stable barring any additional weather-related pressure but expect to decline over the next two weeks. Following this we are scheduled to transition to South Georgia and Florida where the impacts of Hurricane Ian are certain to affect supply. It's too soon to assume what the losses will be, but they will be severe and expect short supply in the southeast over the next two months after the mountain deal wraps up.
- **Grape and Cherry Tomatoes:** Markets firmed up this week as we are seeing more demand on a crop that has been lighter due to weather related pressure. We do expect very short supply on the horizon out of South Georgia and Florida where the impacts of Hurricane Ian are certain to have impacted the crops. It's too soon to assume what the losses will be, but they will be severe and expect short supply in the southeast over the next two months after the mountain deal wraps up.
- **Organic Tomatoes: ESCALATED** Supply will remain limited this week on the entire category.

Mexico

- **Round Tomatoes:** Overall volume was stable this week, particularly on large rounds. Quality remains strong out of Mainland Mexico. Quality is hit and miss crossing through Otay as we are still recovering from the impacts of Hurricane Kay.

- **Roma Tomatoes:** **ESCALATED** Volume will be very light crossing through Otay as Hurricane Kay impacted production in the north as well as Baja Sur. We expect firmer markets through Mid-November. Mainland crossings through Texas are moderate but overall demand is very strong. Quality is mixed and we recommend subbing to rounds where possible to ensure supply.
- **Grape Tomatoes and Cherry Tomatoes:** Lighter volume and stronger demand has caused a slight uptick in the markets; overall quality is still strong.
- **Medley Grape Tomatoes:** Strong numbers continue out of Central Mexico.
- **Tomato on the Vine:** Excellent quality and supply available.

California

- **ESCALATED** Volume will continue to be very light this week and we are expecting conditions not to improve for the remainder of the season. Between the decrease in acreage due to water issues and the cost of labor in California, it has been a struggle that will keep upward pressure on markets through the end of the California season. `

APPLES, PEARS, STONE FRUIT

Apples: West coast new crop apples are being packed; however small sizes remain tight. 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 supply as best as possible until new crop starts next August.

Stone Fruit: California: Winding down for the season and supply is limited.

Red and Black Plums: Winding down for the season out of the Central Valley.