

## Weekly Market Review November 4, 2022

### Overview

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Colored bell peppers continue to be a challenge due to low production however we may start to see some relief as Baja and Coachella will scratch this week. In the west, we continue to see the impacts of Hurricane Kay on the entire tomato and mixed vegetable category crossing through Otay. California tomatoes are done for the season and dry veg is done out of the intercoastal valleys and Central Valley transitioning to Coachella. Steady production in South Georgia continues exception being cucumber. Production out of Mainland Mexico on tomatoes continues to be below normal and demand is high as consumers move west to source tomatoes since the growing regions of Central and South Florida were ravaged by Hurricane Ian. We expect extreme markets on tomatoes in all growing regions through the end of the year (6-8 weeks at minimum) due to several recent extreme weather events as well as dry veg, and citrus crops throughout the region. We are anticipating our first push of cold weather to Northern Mexico this weekend and will need to observe the impacts this event has to vegetables grown in Sonora and Southern Arizona. The remainder of the Salinas season continues to be very challenging with quality, condition and especially supply as markets are at historic record highs and all crops are affected. Weather conditions and diseases have impacted supply with pricing on many of the core items at historical high price levels. Expect continued low production, high markets and prorates. In addition, many shippers could see the start of the desert season with light supplies as many fields saw a loss of supplies due to the heavy rains in Northern Mexico, the desert of Calif and Yuma during the early planting times.

### Market Alert

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- Bell Peppers (Red, Yellow and Mini Sweets) – **ESCALATED**
- Broccoli - **ESCALATED**
- Carrots (Jumbo) – **ESCALATED**
- Cauliflower - **EXTREME**
- Cilantro – **ESCALATED**
- Cucumbers (Slicers) – **ESCALATED**
- French Beans - **EXTREME**
- Garlic – **EXTREME**
- Ginger – **EXTREME**
- Green Beans - **EXTREME**
- Green Onions – **ESCALATED**
- Hot Pepper - **ESCALATED**
- Lettuce (Iceberg, Romaine/Romaine Hearts, Green Leaf & Boston) – **EXTREME**
- Potatoes (40s & 50s) – **EXTREME**
- Melons - Cantaloupe and Honeydew - **ESCALATED**
- Mushrooms – **ESCALATED**
- Strawberries – **EXTREME**
- Sugar Snap Peas – **ESCALATED**
- Tomatoes - **EXTREME**

### WATCH LIST

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- Celery
- Corn
- Green Beans
- Seedless & Mini Seedless Watermelon

### Transportation

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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:

Wed 11/2	Thu 11/3	Fri 11/4	Sat 11/5	Sun 11/6	Mon 11/7	Tue 11/8	Wed 11/9	Thu 11/10
--   49°F	68°   45°F	67°   47°F	66°   47°F	64°   54°F	60°   47°F	58°   46°F	59°   45°F	61°   47°F
 Clear	 Sunny	 Partly Cloudy	 Sunny	 Mostly Sunny	 Showers	 Showers	 Partly Cloudy	 Mostly Sunny

### MOULTRIE, GA

Thu 11/3	Fri 11/4	Sat 11/5	Sun 11/6	Mon 11/7	Tue 11/8	Wed 11/9	Thu 11/10
80°   53°F	81°   62°F	83°   64°F	84°   63°F	82°   62°F	79°   58°F	69°   60°F	73°   61°F
 Sunny	 Sunny	 Mostly Cloudy	 Partly Cloudy	 Partly Cloudy	 Mostly Sunny	 Showers	 Showers

### JALISCO, MX:

Wed 11/2	Thu 11/3	Fri 11/4	Sat 11/5	Sun 11/6	Mon 11/7	Tue 11/8	Wed 11/9	Thu 11/10
--   56°F	82°   55°F	80°   51°F	79°   52°F	79°   53°F	79°   54°F	80°   56°F	80°   56°F	79°   55°F
 Clear	 Sunny	 Sunny	 Sunny	 Sunny	 Sunny	 Mostly Sunny	 Mostly Sunny	 Mostly Sunny

### CULIACAN, SINALOA

Wed 11/2	Thu 11/3	Fri 11/4	Sat 11/5	Sun 11/6	Mon 11/7	Tue 11/8	Wed 11/9	Thu 11/10
--   60°F	93°   60°F	89°   56°F	89°   56°F	89°   57°F	89°   58°F	89°   59°F	89°   59°F	88°   58°F
 Mostly Clear	 Sunny	 Sunny	 Sunny	 Sunny	 Mostly Sunny	 Sunny	 Sunny	 Sunny

### SALINAS, CA

Wed 11/2	Thu 11/3	Fri 11/4	Sat 11/5	Sun 11/6	Mon 11/7	Tue 11/8	Wed 11/9	Thu 11/10
--   43°F	60°   39°F	65°   49°F	62°   51°F	59°   47°F	54°   44°F	53°   43°F	54°   41°F	57°   41°F
 Partly Cloudy	 Sunny	 Partly Cloudy	 Partly Cloudy	 PM Showers	 Showers	 Showers	 Mostly Sunny	 Partly Cloudy

### COACHELLA, CA

Wed 11/2	Thu 11/3	Fri 11/4	Sat 11/5	Sun 11/6	Mon 11/7	Tue 11/8	Wed 11/9	Thu 11/10
--   54°F	70°   47°F	75°   43°F	77°   47°F	77°   49°F	76°   49°F	70°   47°F	70°   46°F	71°   46°F
 Mostly Clear	 Mostly Sunny	 Mostly Sunny	 Mostly Sunny	 Sunny	 Mostly Sunny	 Partly Cloudy	 Sunny	 Mostly Sunny

### QUINCY, FL

Thu 11/3	Fri 11/4	Sat 11/5	Sun 11/6	Mon 11/7	Tue 11/8	Wed 11/9	Thu 11/10
84°   55°F	83°   61°F	85°   63°F	86°   63°F	85°   62°F	82°   59°F	72°   59°F	76°   59°F
 Sunny	 Sunny	 Mostly Cloudy	 Partly Cloudy	 Partly Cloudy	 Mostly Sunny	 Showers	 Showers

## **Fruits & Vegetables**

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**Avocados:** Mexico continues steady and strong harvests with plenty of orchards available to harvest, and last week closed out at 54.6 Mil lbs. for the US, a 9% increase from the previous week. Mexico still accounted for 98% of the total volume and will be the predominant market share leader through Super Bowl. Field pricing has remained stable, with a healthy supply of all sizes available. 48 and 60 counts dominate the size curve, followed by 40, 70, 84, and 32/36 counts. We could see the size curve shift in December as we move into higher elevations, where the fruit has sized up on the trees. The Loca crop is winding down, and a couple more weeks until Mexico is fully in the Aventajada crop, with the Normal crop on its heels.

**Bananas:** Volume is lighter due to weather impacts, higher global demand, and lighter production. No quality issues.

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

**Table Grapes:** Growers in the Central San Joaquin Valley are projecting they will be 100 million boxes short due to weather related pressures this season. We are seeing an upward tick on demand for larger fruit while medium sized fruit is steady. Autumn Kings, Scarlett Royals and globes all are showing overall good quality and color. First import estimates are in and forecasted to be down 7-10 percent this season.

## **Berries**

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**Strawberries:** **EXTREME** Volume estimates out of Santa Maria hit a season-low this week. Temperatures have cooled down quite a bit over the last week with day temps in the mid to upper 60's while nights are in the mid 40's. Conventional and organic fruit quality and size show signs of recovery with the cooler temperatures, but production remains down. Crews are throwing down 25-40% of the fruit, still showing quality issues. Cool weather, shorter days, wet mornings, and wind in the afternoons have put added pressure on already empty fields. The fruit has not had a chance to color up and Watsonville production remains day-to-day. Growers report that quality and size are showing some improvement, but this was short-lived due to mid-week rainfall. It is still early in Mexico's season, but volume is improving. Florida growers are reporting heavy flower sets on plants in the organic fields, and they expect to start harvesting a few crates of organics in the next two weeks. Conventional production will hopefully start shortly after, and overall supply is expected to remain very limited over the next 3-7 weeks.

**Blackberries:** Watsonville growers are still harvesting small numbers and expect to go another 2-3 weeks if movement supports it. The quality has been good. Mexico numbers should increase over the next two weeks, and quality has been good with the occasional leaker.

**Raspberries:** Watsonville growers should continue to harvest small numbers for the next week or so. The quality has been good. Mexico's numbers continue to increase, and quality has been good. Some growers are reporting some broken fruit and uneven ripening.

**Blueberries:** Central Mexico will continue to ramp up quick as its season starts. South American imports from Peru, Argentina, Uruguay, and Mexico are arriving on both coasts. The fruit quality is excellent, and the sizing is large.

## **California**

### **Citrus**

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**Oranges:** All shippers have transitioned to Navels although there are still a handful of Valencia's still available. Quality is good and we are seeing a run of sizes available.

**Lemons:** New Crop Lemons have begun in District 3 and District 1. Current supply is peaking on 115/140/165 with an even balance of Fancy & Choice, and some Standard Grade. Field and Packinghouse QC is seeing some wind scaring in the Choice/Standard grade. Fancy looks nice! Volume & Availability is light due to fruit readiness and more fruit will be available each week

**Limes:** The market is expected to remain stable throughout November although we are expecting inconsistent supplies during the Holiday season. Currently sizing is running heavier to the mid-range sizes. Conditional defects in the form of styler-end breakdown and oil spots continue to impact the fruit due to recent inclement weather. In addition, consistent rain events over the past few months are expected to impact the bloom in January in terms of yields and quality. We will likely see a substantial spike in pricing in January 2023, as we did this past January 2022.

**Grapefruit:** California Grapefruit is mostly finished for the season with Texas getting started over the next few weeks. Florida crop has started with good quality as the hurricane did not do as much damage as anticipated.

**Imports/Specialties:** Imported clementines and kiwi are available. California Mandarins will be starting by the end of Oct and shippers are reporting supplies to be up this year compared to last. Please ask your procurement specialist for promotional opportunities!!

### **West Coast Lettuce**

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#### **Lettuce (Iceberg, Romaine, Romaine Hearts, Green Leaf, Red Leaf & Butter): EXTREME**

The western vegetable industry continues to experience a series of challenges due to extreme weather and heavy disease pressure resulting in lower yields, short supply, and poor quality. In some extreme cases, Growers are experiencing complete losses, due to the INSV virus and weather-related issues on iceberg lettuce, romaine, romaine hearts and all leaf items. Volume is going to continue to decrease until the transition to Yuma in late November with prorates on numerous items, especially iceberg lettuce. This has significantly impacted markets in terms of price and quality, and shippers having to deviate from the normal quality we are accustomed to. Our contracts are continuing to perform better than the market but expect higher pricing. In addition, many shippers could see light production at the start of the desert season as many fields saw a loss of supplies due to the heavy rains in Northern Mexico, the desert of Calif and Yuma during the early planting times. Expect lighter supplies to continue into early to mid-December, possibly into January

### **Eastern and Western Vegetables**

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**Green Bell Pepper:** Supply is lighter this week and overall quality has been good out of South Georgia. We are starting new crop out of the desert and should see crossing through Nogales in 10 days and quality in the west is very nice.

**Red Bell Pepper: ESCALATED** Markets are holding strong as supply remains limited this week. We are scratching this week in the desert and quality is very nice.

**Yellow Bell Pepper: ESCALATED** Markets are holding strong as supply remains limited this week.

**Mini Sweet Pepper:** **ESCALATED** Supply is lighter this week and pricing is higher.

**Mixed Chili Pepper:** **ESCALATED** In the east, we are ramping production up out of South Georgia. In McAllen, volume is lighter on all varieties and seeing quality issues on the tomatillos. Anaheim, Serrano, and Jalapeno are all holding at higher-than-normal pricing 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 over the next several weeks.

**Eggplant:** Good supply out of South Georgia and Nogales and quality is very nice.

**Slicer Cucumbers:** **ESCALATED** Markets remain firm as volume is lighter out of Baja and South Georgia this week. Lighter supply crossing through Nogales and Texas as well, but we hope to see improvement over the next 10 to 14 days barring any further weather events.

**English Cucumbers:** Good supply and excellent quality. Demand remains strong due to less availability of slicers.

**Pickles:** Lighter volume available this week and quality will be mixed out of Mexico and Florida.

**Green Beans:** **EXTREME** Extremely limited supply available out of South Georgia. There are a few beans out west, but markets remain very high and expected to be snug through the Thanksgiving Holiday.

**French Beans:** **EXTREME** Demand exceeds supply out of Mexico and Guatemala. Quality continues to be fair to good. Relief out of Mexico has now been pushed back to mid-Nov. Guatemala will continue to be light as past weather has hampered harvesting and quality.

**Zucchini/Yellow Squash:** Overall quality is very nice. Markets were mixed this week as supply tightened up crossing through Nogales and eased back in South Georgia.

## **Herbs**

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Challenges on availability and supply will continue out of Mexico and the US due to past and present weather conditions. **CHIVES** supplies will continue to be light for the next 7-10 days. **CHERVIL**, **MARJORAM**, **SORREL**, and **TARRAGON** supply will continue to be day-to-day. Demand has picked up on **ROSEMARY** with the start of the Holiday Season. **THYME** and **SAGE** are right behind in the demand for the next 8 weeks.

<b>HERB</b>	<b>SUPPLY</b>	<b>QUALITY</b>	<b>COUNTRY OF ORIGIN</b>
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	Limited	Steady	USA
Tarragon	Limited	Steady	MEXICO
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

## **Melons**

**Cantaloupe and Honeydew: ESCALATED** Domestic melons from Arizona are quickly finishing as all growers have battled lower yields caused by weather and whitefly. We were optimistic production in Yuma would continue through next week but that does not look to be realistic right now. What is being harvested in our remaining fields has been very large jumbo fruit on both cantaloupes (6Js) and Honeydew (4Js) which is extremely uncharacteristic for this time of the year. There are crossings through Nogales which will be utilized where necessary as we bridge the transition to western offshore arrivals in a few weeks. We are fortunate to have our first arrivals from Guatemala hitting Florida early next week which will provide immediate relief to all eastern divisions. We anticipate a good mix of sizing initially which will be very helpful. Honeydew production from Guatemala should start arriving by Monday 11/7. Sizing on the dewes is primarily 5/5Js from all growing regions right now with sparse availability on the 6s. Volume on offshore cantaloupe and honeydew will remain limited for the next couple of weeks. Hurricane Lisa is expected to make landfall tonight on the coast of Belize and is forecast to cross the northern part of Guatemala as a tropical storm. It is expected to be a rain event with little damage due to winds. We currently expect there to be an interruption of harvest for a day or two due to rain.

**Watermelon: WATCH LIST** Overall quality is very nice, strong demand and light volume are keeping markets firm this week. We are starting to see more limits on loading options as the season

winds down; Nogales and McAllen are the primary shipping points. Mini watermelons seem to be easing back in price as store sets change and demand drops.

## **Mixed Vegetables**

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**Artichokes:** Expect lighter supplies over the next several weeks

**Arugula:** Supply is average, with fair quality due to some of the weather-related issues. Expect unstable supplies and quality for the remainder of the Salinas season

**Asparagus:** **ESCALATED** Mexican production continues to be low due to inclement weather in the growing areas. Peruvian production has increased slightly this week. This trend should continue through November. Markets are still very active, with no change in volume from Mexico.

**Broccoli/Broccoli:** **ESCALATED** Current supply continues to be light, market is considerably higher.

**Brussels Sprouts:** Still seeing good supply and quality is generally good to excellent with occasional insect damage and residual problems from mildew. Now is a good time to begin forecasting for holiday VA needs.

**Carrots:** **ESCALATED (JUMBOS)** Baby peeled, and food service items are in great supply. Current field sizing is small, so supply continues to be limited on Cellos/Jumbos in California. Regionally, Michigan and Illinois are in good supply with Cellos and Jumbos.

**Cauliflower:** **EXTREME** Cauliflower supply is extremely short from the cooler weather, and the market has increased considerably. Expect light supplies to continue until the Yuma season gets started towards the end of November.

**Celery:** Supplies are moderate although we look for available supplies tight going forward with quality issues caused by the extreme hot weather. Market continues to be slightly stronger, and we anticipate market to continue escalating as we approach the holidays as demand increases and available supplies start to decrease.

**Cilantro:** **ESCALATED** Cilantro supply is going to continue to be light as yields continue to be light due to the recent heat and adverse weather in all growing areas.

**Corn:** **WATCH LIST** Good quality. Markets are firming up out of Coachella and South Georgia.

**Fennel:** Supplies are down slightly from what we have seen the last few weeks but there is still available, mostly on the 24's and 30's 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:** Supply is increasing, and quality is improving.

**Green Onions:** **ESCALATED** Market is steady, although supply continues to be very short.

**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. We should begin to see seasonal price increases as the holidays approach and supply gets tighter as retail pulls increase on an already strained supply.

**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):** Supply is average, with fair quality due to some of the weather-related issues. Expect unstable supply and quality for the remainder of the Salinas season.

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

**Red Cabbage:** Supply is increasing, and quality is improving.

**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 improve in early November. Peruvian production is almost wrapped due to seasonality. California's new crop is very light. However, the quality is good. Mexico's crop is behind schedule due to multiple rain events. Supplies are expected to increase out of Mexico in three weeks.

**Spinach (Bunched & Baby):** Supply is average, with fair quality due to some of the weather-related issues. Expect unstable supply and quality for the remainder of the Salinas season.

**Spring Mix:** Supply is average, with fair quality due to some of the weather-related issues. Expect unstable supply and quality for the remainder of the Salinas season.

**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:**

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Onion demand appears to be improving across the board. Growers seem to be selling out by week's end for the second consecutive week, which is indicative of a strong Thanksgiving push now. The low yields, and short storage supplies on hand (supported by the NOA report) are good indicators

that when demand does pick up, pricing could move up quickly. In most years, a harvest market almost always stays in single digits – and may even fall in the \$5 - \$6 FOB range. The long-term optimism from growers on a strong pricing finish remain alive and well. Washington remains in better shape than Idaho, but they are still off from last year, and their normal yields. Size profiles have been on the smaller end, with most product sizing in the medium and jumbo range. We have seen some improved availability on colossal and super colossal sized onions in recent weeks, however, this is not believed to be a sustained supply the whole way through. The elevated foodservice demand we experienced during COVID seems to have dissipated, and we are back to a more normal level of demand. What has not changed, however, is the input costs growers are experiencing on the current crop. There is concern that if the crop cannot yield similar returns, or better, to last years' crop, that growers will simply not be able to cover their costs. If that does happen, we may see a 'shake-up' in grower/shipper community for next season. Trucks have not reacted yet to holiday demand for the most part. They do appear to be tightening to certain parts of the country, and as the week goes on, most carriers are covering their available equipment, which is causing a bit of a short supply situation. The Q4 push we are accustomed to seeing is not taking place.

### **Potatoes: EXTREME (40s & 50s)**

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The potato market has severely tightened up as growers are finished with harvest. Pricing took a swift increase over these last two weeks. This is a rather unprecedented time to see such a large increase. Like last year, growers are staring down record offers from processors (even higher than last season) and are in no rush to run their potatoes at the current pricing levels. The process market is yielding a better return than the current fresh market. Because of this, the fresh market has no choice but to pay more for product, or they simply will not get the supply. We anticipate we will continue to see this trend to get growers to release product on the fresh side. Other growing regions are echoing the same sentiments as well. Thanksgiving ads are about to be in full production effect for next few weeks. One of the big factors that has made product so tight over the last few weeks is the abbreviated run schedules at the sheds. In year's past, we see cartons become plentiful during this time as they become a byproduct as sheds increase production to meet consumer bag demand. It will be interesting to see what takes place this season with the crop being as short as it is. Trucks have not reacted yet to holiday demand. They do appear to be tightening to certain parts of the country, and as the week goes on, most carriers are covering their available equipment, causing a bit of a short supply situation. The Q4 push we are accustomed to seeing is not taking place.

### **TOMATOES**

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#### **East Coast**

- **Round and Roma Tomatoes: EXTREME** Supply will get very short this week and quality is fair at best as the local deals wind down and Quincy continues to harvest very light numbers. We are seeing some salvage harvesting in the Ruskin/Palmetto region which was hit hardest by Hurricane Ian, they will have very little supply and quality will be well below normal expectations. We are seeing Force Majeure declarations from the growers in these regions for their loss. We will likely see this type of market environment through the end of the year. We ask to keep flexible on varieties and size to help navigate through this trying time so we can do our best to keep the supply chain consistent.
- **Grape and Cherry Tomatoes: EXTREME** We are seeing demand exceeds supply conditions on all the snacking varieties due to the impacts of Hurricane Ian. Growers are declaring Force Majeure as we expect type of market environment through the end of the year. We ask to keep

flexible on varieties and size to help navigate through this trying time so we can do our best to keep the supply chain consistent

- **Organic Tomatoes:** **EXTREME** Extremely limited supply available.

### Mexico

- **Round and Roma Tomatoes:** **EXTREME** Mainland Mexico and Baja have been impacted by several weather events over the past two months that have either damaged crops or have delayed them. Between this and the conditions on the east coast, we expect to volatile markets through the end of the year as we transition to Sinaloa on the mainland around Mid to late December and from Central Baja to Southern Baja over the next 2-3 weeks. We ask to keep flexible on varieties and size to help navigate through this trying time so we can do our best to keep the supply chain consistent.
- **Grape Tomatoes and Cherry Tomatoes:** Baja should be our main supplier for the fall and unfortunately that crop was decimated by Hurricane Kay. We are doing everything we can keep supply moving but are seeing significant pro-rates and shorts. Growers are declaring Force Majeure and expect volatile conditions through December. We ask to keep flexible on varieties and size to help navigate through this trying time so we can do our best to keep the supply chain consistent.
- **Medley Grape Tomatoes:** Strong numbers continue out of Central Mexico.
- **Tomato on the Vine:** Excellent quality and supply available.

### California

- **Done for the season.**

### APPLES, PEARS, STONE

#### FRUIT

**Apples:** The 2022/23 Apple Crop out Washington was damaged by Severe High Temps last July and extremely low temps in mid-April 2022. Washington apple crop is projected to be around 108.7 million 40-pound boxes, roughly an 11% decrease from the 122.3 million boxes from last year's crop. Growers are still evaluating the impact of the prolonged cold weather that hit the Pacific Northwest. Markets are expected to settle slightly coming into Q4 as growers continue harvesting.

**Pears:** This year's pear crop will likely be down significantly due to Severe High Temps last July and extremely low temps in mid-April 2022. Growers are harvesting and will have numbers by December. Markets will likely remain higher this year.