

## Weekly Market Review December 9, 2022

### Overview

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Florida commodities are beginning to turn the corner and we are seeing more availability but expect some volatility for the remainder of the year. Good volume continues on squash, cucumbers, and green bells. Colored pepper supply continues to remain tight despite ongoing crossings through Otay, but we should see more pepper crossing over the next two weeks. The entire tomato and mixed vegetable category crossing through Otay remain short due to weather impacts and virus. Round tomato production out of Mainland Mexico and Florida continues to be shorter than normal. Fortunately, we did see softer markets this week due to a combination of factors putting downward pressure on the market. A lack of demand as well as more viability of romas have been major contributors to this but we still expect volatility over the next several weeks due to lighter volume and holiday volatility. We need to remember that despite conditions this week; Florida continues to deal with the impacts of Hurricane Ian. We hope we see continued improvement over the next week that will continue to push prices down. We are seeing extreme pricing and shortages expected to continue on Serrano and Anaheim peppers due to cold weather impacting the growing regions in Mexico (expect some improvement by Dec 15). In Yuma, the volatile markets are expected to continue through at least mid-December, potentially through the end of the month on some items. With significantly low yields across most commodities, the industry has been reaching early into new fields to cover contract commitments and regular business to satisfy customer needs. Along with being significantly ahead of schedule on all crops, weather in the Yuma area remains much cooler than normal for this time of year, on average 10 degrees below normal. The cool conditions are not allowing product to move forward or size up and will keep supply tight over the next 2 weeks on many items. Currently all items are 1-2 weeks behind harvest schedule although availability has improved slightly on some items.

### Market Alert

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- Arugula – **ESCALATED**
- Bell Peppers (Red, Yellow, and Mini Sweets) – **ESCALATED**
- Broccoli – **ESCALATED**
- Cabbage (Red & Green) - **ESCALATED**
- Carrots (Jumbo) – **ESCALATED**
- Cauliflower – **EXTREME**
- Celery - **ESCALATED**
- Cilantro – **ESCALATED**
- Corn – **ESCALATED**
- Fennel - **EXTREME**
- French Beans - **ESCALATED**
- Garlic – **EXTREME**
- Ginger – **EXTREME**
- Green Beans - **ESCALATED**
- Green Onions – **ESCALATED**
- Hot Pepper - **ESCALATED**
- Serrano and Anaheim Pepper - **EXTREME**
- Lettuce, Iceberg – **EXTREME**
- Lettuce, Romaine/Romaine Hearts, Green Leaf & Boston – **ESCALATED**
- Melons (Cantaloupe, Honeydew, & Watermelon) - **ESCALATED**
- Mushrooms – **ESCALATED**
- Parsley – **ESCALATED**
- Potatoes (40s & 50s) – **ESCALATED**
- Spring Mix – **ESCALATED**
- Spinach - **ESCALATED**
- Strawberries – **EXTREME**
- Sugar Snap Peas (West) – **EXTREME**
- Tomatoes (Rounds, Grapes, and Cherry) – **EXTREME/AOG**

### WATCH LIST

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- Seedless & Mini Seedless Watermelon
- Soft Squash (Zucchini and Yellow Squash)

## Transportation









Although diesel rates are near record highs truckload rates continue to decline as consumer spending on durable goods declines reducing demand in the truckload market.

## Weather









### OXNARD, CA:

| Thu 12/8  | Fri 12/9  | Sat 12/10   | Sun 12/11   | Mon 12/12   | Tue 12/13  | Wed 12/14   | Thu 12/15   |
|---|---|---|---|---|--|---|---|
| 60°   44°F  | 60°   47°F  | 59°   54°F  | 57°   44°F  | 57°   40°F  | 57°   43°F   | 58°   45°F  | 59°   47°F  |
|  |  |  |  |  |  |  |  |
| Mostly Sunny  | Mostly Sunny  | Showers   | AM Light  | Sunny   | Sunny  | Partly Cloudy   | Partly Cloudy   |









### JALISCO, MX:

| Thu 12/8  | Fri 12/9  | Sat 12/10   | Sun 12/11   | Mon 12/12   | Tue 12/13   | Wed 12/14   | Thu 12/15   |
|---|---|---|---|---|---|---|---|
| 81°   55°F  | 81°   55°F  | 80°   54°F  | 79°   54°F  | 78°   50°F  | 76°   49°F  | 75°   47°F  | 76°   48°F  |
|  |  |  |  |  |  |  |  |
| AM Clouds/PM  | Mostly Sunny  | Sunny   | Sunny   | Mostly Sunny  | Mostly Sunny  | Mostly Sunny  | Mostly Sunny  |









### CULIACAN, SINALOA

| Thu 12/8  | Fri 12/9  | Sat 12/10   | Sun 12/11   | Mon 12/12   | Tue 12/13   | Wed 12/14   | Thu 12/15   |
|---|---|---|---|---|---|---|---|
| 96°   58°F  | 91°   54°F  | 92°   55°F  | 91°   53°F  | 87°   50°F  | 82°   49°F  | 82°   49°F  | 81°   50°F  |
|  |  |  |  |  |  |  |  |
| Mostly Sunny  | Mostly Sunny  | Sunny   | Sunny   | Mostly Sunny  | Mostly Sunny  | Mostly Sunny  | Partly Cloudy   |









### YUMA, AZ

| Thu 12/8  | Fri 12/9  | Sat 12/10   | Sun 12/11   | Mon 12/12   | Tue 12/13   | Wed 12/14   | Thu 12/15   |
|---|---|---|---|---|---|---|---|
| 69°   42°F  | 68°   41°F  | 71°   42°F  | 70°   51°F  | 62°   40°F  | 61°   38°F  | 60°   41°F  | 60°   42°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Sunny   | Sunny   | Mostly Sunny  | Mostly Sunny  | Sunny   | Mostly Sunny  | Partly Cloudy   |

### COACHELLA, CA

| Thu 12/8  | Fri 12/9  | Sat 12/10   | Sun 12/11   | Mon 12/12   | Tue 12/13   | Wed 12/14   | Thu 12/15   |
|---|---|---|---|---|---|---|---|
| 69°   38°F  | 69°   36°F  | 68°   44°F  | 64°   39°F  | 61°   34°F  | 61°   34°F  | 60°   35°F  | 62°   37°F  |
|  |  |  |  |  |  |  |  |
| Sunny   | Sunny   | Sunny   | Showers   | Mostly Sunny  | Sunny   | Mostly Sunny  | Mostly Sunny  |

### IMMOKALEE, FL

| Thu 12/8  | Fri 12/9  | Sat 12/10   | Sun 12/11   | Mon 12/12   | Tue 12/13   | Wed 12/14   | Thu 12/15   |
|---|---|---|---|---|---|---|---|
| 83°   62°F  | 85°   58°F  | 84°   59°F  | 84°   58°F  | 83°   60°F  | 84°   62°F  | 87°   65°F  | 85°   62°F  |
|  |  |  |  |  |  |  |  |
| Partly Cloudy   | Partly Cloudy   | Sunny   | Mostly Sunny  | Partly Cloudy   | Mostly Sunny  | Mostly Sunny  | PM Showers  |

## Good Buy

| Commodity       | Expert Tip   |
|-----------------|--|
| Hawaiian Papaya | Hawaiian Papaya rich in vitamins A and C, high in potassium and fiber— and despite their lusciousness, they're a fat-free, cholesterol-free treat you can enjoy guilt-free.  |
| Eggplant        | Looking for a vegetarian substitute to chicken parmesan? Why not try the same technique with eggplant instead. Bread thin slices of eggplant, just like you would chicken and bake it in the oven or fry it in a pan. Enjoy with some pesto or marinara sauce! |

## Fruits & Vegetables

**Avocados:** Last week there was a 30% decrease in volume packed/shipped into the US market compared to the week prior. The total volume crossed into the market was around 49M lbs. Week 45 brought in significant volume – over 60M lbs.- a surplus from which the market is still correcting. The demand coming out of the Thanksgiving holiday was strong, represented by increased field pricing last week. With Christmas and New Year's Ads now on the books, the demand for fruit in the field is expected to remain strong for the month. The lighter harvest volume weeks from Mexico have shifted the market and placed 48s and 70s in a slight demand exceeds supply position and relatively stable on 40s and 60s. We are moving into higher elevations and are finding more 40s and larger in the pack outs of the Loca and the Aventa crop. Oil content is high with an excellent flavor profile, and the higher oil content also shortens the time it takes to ripen Mexican avocados.

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

**Pineapples:** Excellent quality peaking on 7 and 8 cts.

**Table Grapes:** Growers in the Central Valley are pulling from storage and starting to see a wide range of quality as daily harvesting will end this week. We are seeing an uptick on demand for larger fruit while medium sized fruit is steady. Autumn Kings, Autumn Royals and globes are showing good quality and color. First import estimates are forecasted to be down 7-10% and import fruit is not being received, and quality should be normal for this time of year and expect stable markets over the next few weeks. Demand expected to be normal at retail for the holiday pull.

## Berries

**Strawberries:** **EXTREME** Due to the rain events in Santa Maria and Oxnard, CA, fruit quality challenges continue to be prolonged. Harvest crews will continue to manage packs out and quality issues. Out of Mexico, some regions saw rainy and cloudy weather last week and this week, which reduced the volume coming in. Florida has started, but volumes remain minimal, but overall quality remains good, with occasional quality issues.

**Blackberries:** We will have a slight downward trend for the next two weeks before increasing supply in January. Currently, we do not have weather disruption events forecasted. Quality is good, with occasional leaky

**Raspberries:** Raspberries will continue to downtrend for the next 1-2 weeks. Supply will uptrend gradually towards their spring peak starting at the beginning of the new year. Santa Maria and Santa

Maria are harvesting minimal volume. Oxnard is post-peak, and they will continue to downtrend through the end of the year. Baja will remain stable for 7-10 days before up trending gradually through Q1.

**Blueberries:** Mexico will continue to ramp up quickly. Peruvian volumes will remain strong through year-end. Baja volume is past its fall peak, and volumes will be minimal through the end of the year.

## **California**

### **Citrus**

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**Oranges:** All shippers have transitioned to Navels. Quality is good with most shippers peaking on smaller sizes, mostly fancy grade.

**Lemons:** Good availability, very good quality and sizing is peaking on 165's and larger. Mexican lemons are available.

**Limes:** The market is expected to remain relatively stable through mid-December with an increase in mid-sized and larger fruit. Look for the market to strengthen with a slight upward trend towards the 2<sup>nd</sup> half of the month as marginal weather is reducing overall quality and shelf life is deteriorating. In addition, with the past rain patterns over the last few months, we expect to see the impact to the blooms in January in terms of yields and quality. We will likely see a substantial spike in pricing in January 2023, and possibly disrupt the supply chain during the upcoming holiday season.

**Grapefruit:** Good supply and very good quality out of Texas and California.

**Imports/Specialties:** The California mandarin season has started with good availability and outstanding quality.

### **West Coast Lettuce**

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**Iceberg:** **EXTREME** Supplies continue to be well below normal as fields are very uneven and frames and weights are way below normal, but quality overall is clean. The market is very active and the forecast for the week will continue to be active due to cool weather with well below temperatures for the next 6 days with Lettuce ice in the forecast.

**Romaine, Romaine Hearts:** **ESCALATED** Romaine and Romaine Heart supplies continue to be light although the market is slowly adjusting down although we need to be careful as the cool weather in the forecast will significantly slow product growth and supplies could get very tight again going into next week. Many shippers are now able to cover averages, but many still do not have extra volume to sell. Quality is fair with lighter weights; plants have suffered extremely cold temperatures in recent weeks. In addition, due to multiple episodes of field and frost damage at the field level, we are now seeing blister on Romaine and Romaine hearts. It will have varying degrees between clear blister and discolored blister.

**Green Leaf & Red Leaf:** **ESCALATED** Production in the desert region continues to improve although markets and demand remain strong. Due to weather, crop is late with smaller heads and lighter weights. Overall quality is looking good with slight signs of wind/fringe burn. Cooler than normal temps impacting harvest times. Markets and demand remain strong.

**Butter:** **ESCALATED** Production in Yuma is steady. Quality is good although experiencing smaller heads and lighter weights. Cooler weather is impacting harvest time. Demand remains strong.

### **Eastern and Western Vegetables**

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**Green Bell Pepper:** Stable supply expected over the next week and overall quality has been good. Product available in South Florida, Coachella and Nogales.

**Red Bell Pepper:** **ESCALATED** Markets are holding strong as supply remains limited this week and quality is good. We are still harvesting in the desert and should start seeing more fruit available in Nogales over the next ten days.

**Yellow Bell Pepper:** **ESCALATED** Markets are holding strong as supply remains limited this week and do expect to see pro-rates.

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

**Mixed Chili Pepper:** **ESCALATED/EXTREME** In the east, supply improving out of South Florida (Cubanelle, Long Hots, Hungarian Wax, Jalapeno and Shishito. In McAllen, volume is lighter on all varieties and seeing quality issues on the tomatillos. Habanero, Jalapeno and Poblano are all holding at higher-than-normal pricing while the shortest availability is on Serrano and Anaheim. We are seeing pricing upwards of 70 dollars on Serrano and mid 40's on Anaheim. We are seeing quality issues and low production from Coahuila, 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 that will hopefully bring off some pressure on McAllen.

**Eggplant:** Good supply available and quality is good in South Florida and crossing through Nogales.

**Slicer Cucumbers:** Markets firmed up a tad with lighter picks this week and higher demand at retail. We expect stable supply through December in South Florida as well as crossing through Texas and Nogales.

**English Cucumbers:** Good supply and excellent quality available.

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

**Green Beans:** **ESCALATED** Light supply available out of Florida and Mexico but supply and quality seem to be improving.

**French Beans:** **ESCALATED** Cooler temperatures in Guatemala have slowed down production, but we should see improvement in supply starting at the end of the next week. Quality continues to be hit or miss.

**Zucchini/Yellow Squash:** **WATCH LIST** Mixed markets this week, yellow squash is firmer while Zucchini remains stable. In Nogales, and Florida. Quality is mixed and seeing some prominent scarring on product in the east and good quality out west. Yellow squash is tight and will be for the next week.

## Herbs

Quality and production remain good from Mexico. Both imported and domestic **CHERVIL** production has continued to be affected by the weather. The cooler weather has caused a supply issue on **SORREL** (yellowing and spotting), **LEMON THYME** (not growing), and **LAVENDER** (has stopped growing).

| 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          | 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: ESCALATED** Cantaloupe arrivals in Florida have increased but demand continues to outpace supply. Market remains very active with strong pricing. Sizing on the cantaloupe is a solid mix of 9-12cts count and even some 15s. Jumbo fruit will be very limited over the next 10-14 days.



Quality has been solid with good external characteristics while brix levels have primarily been holding a respectable 11-13%.

**Honeydew: ESCALATED** Supply remains fairly limited especially on smaller sizes (6/8s) from offshore production. Our current pattern has been primarily 5s and larger. Quality on the honeydews has been very good. Dews have been mostly clean with occasional scarring and have good internal quality.

**Watermelon: ESCALATED** 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 to continue over the next several weeks.

**Arugula: ESCALATED** Lighter available supplies, market continue stronger. Expect unstable supply to continue through mid-December due to the cooler weather in the desert

**Asparagus: ESCALATED** Mexican production continues to remain light, especially on large and jumbo. Peruvian production continues to increase. This trend should continue for the next two to three weeks. Markets are less active after the holiday.

**Broccoli/Broccoli: ESCALATED** Expect lighter supplies to continue over the next few weeks as the cool weather is slowing growth. Expect pricing to continue very active.

**Brussels Sprouts:** Good available supplies, market is steady.

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

**Cauliflower: EXTREME** Cauliflower supply is still limited as cooler weather continues to slow growth. Overall quality is good but expect continued uniformity issues. Outlook is for Cauliflower availability to remain extremely light through next week.

**Celery: ESCALATED** - Supplies are lower than expected from adverse growing conditions due to weather, and diseases that have affected yield. Low to moderate supplies are expected over the coming few weeks with a very strong and firm market.

**Cilantro: ESCALATED** Cilantro supply is going to continue to be light through next week as cooler than normal temperatures continue to slow plant growth.

**Corn: ESCALATED** Markets are firming up out of Nogales and South Florida and quality is very nice.

**Fennel: EXTREME** Available supply of Fennel continues to be very light as growers are gapping between growing regions and cool weather is slowing growth.

**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** Lighter supply with good quality and market continues active with steady pricing

**Green Onions: ESCALATED** - Supplies are improving, but still well below normal volume and quality is improving.

**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 will continue to see upward pressure on prices as the Holiday pull is now in full swing and expected to remain that way through New Year's.

**Napa Cabbage:** Market continues to be very active; quality is improving now that we are in the desert

**Parsley (Curly, Italian): ESCALATED** Curley Parsley supplies are improving. Italian supplies will continue to be light through next week. Overall quality is good

**Rapini:** We continue to see steady supplies, quality is good.

**Red Cabbage: ESCALATED** Lighter supply with good quality and market continues active out of California.

**Snow Peas and Sugar Snaps: EXTREME - West Coast** Demand exceeds supply, and we see extreme markets out of the west. Supplies are very limited out of California. New crop sugar snap peas out of Mexico have started in VERY limited supply. Out of the east, Guatemalan supplies have improved. Although short-lived, we are still seeing some Peruvian peas in Miami.

**Spinach (Bunched & Baby): ESCALATED** Lighter available supplies, market continues stronger. Expect unstable supply through next week due to the cooler weather in the desert.

**Spring Mix: ESCALATED** Lighter available supplies continue, market is stronger. Expect unstable supply through next week due to the cooler weather in the desert.

**Sweet Potatoes and Yams:** New crop is in full swing out of both North Carolina and Mississippi and quality is looking very nice. The holiday pull has been strong before Thanksgiving with a lot of #1 and consumer bags being shipped over the last few weeks. This has led to some deals to be had



on jumbos out of both shipping areas. We should expect to see demand continue to be steady throughout the holidays and into the new year.

### **Onions:**

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Onion demand has flattened this week, in large part due to it being Thanksgiving week. Buyers have finished their purchasing in advance of the holiday logistics challenges, and interruption in shipping schedule. The market does not appear to be moving anywhere fast any time soon. The long-term optimism on the current crop is beginning to wane a bit – at least for the rest of 2022. If there is going to be a spike in the market, we are looking at 2023 and beyond. Idaho/Oregon maintains that their current pace of shipping, they will be done by the middle of March. This is similar to last season's crop end date. The underlying factors remain in place for a very strong finish – but it will all depend on demand levels. The low yields, and short storage supplies on hand (supported by the NOA report) are good indicators of this. Washington remains in better shape than Idaho from a supply standpoint. Size profiles have been on the smaller end in both regions, with the majority of 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. Growers are expressing further concern regarding continually rising overhead costs (fuel, seed, packaging, etc.). Their suppliers are all asking for hefty increases for next season above the already inflated overhead in this year's crop. It is not impossible that we see further consolidation among growers and shippers, or just less onion acreage being grown altogether out of the Northwest. Trucks have tightened up some, and rates have increased some. It seems to be as much about weather related challenges, as opposed to heightened levels of Q4 holiday demand.

### **Potatoes: ESCALATED**

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Potato demand has flattened this week, in large part due to it being Thanksgiving week. Buyers have finished their purchasing in advance of the holiday logistics challenges, and interruption in shipping schedule. The potato market continues to remain tight, but pricing does appear to have leveled off for the time being. Pricing continues to hold at record levels on just about all sizes/grades for this time of year. Growers continue to receive record offers from processors (even higher than last season), and reports of further record breaking offers for the Spring continue to roll in. Because of this, the fresh market has a 'safety net' of where pricing will likely not fall beneath. We anticipate we will continue to see this trend as a means to get growers to release product on the fresh side. Other growing regions are echoing the same sentiments as well. National supply reports are showing that there are less potatoes this year than this last year – and this is not considering the six million pounds plus that have already been sold to processors. The market is as much about what processors are willing to pay, as it is about demand on the fresh side. In a way, the fresh demand is almost a non-factor this season. Trucks have tightened up some, and rates have increased some. It seems to be as much about weather related challenges, as opposed to heightened levels of Q4 holiday demand.

### **TOMATOES**

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#### **East Coast**

- **Round Tomatoes: EXTREME** Supply seems a slightly improved this week and we did see additional offers on the market. Growers are still salvage harvesting in the Ruskin/Palmetto region which was hit hardest by Hurricane Ian but seeing a few tomatoes out of South Florida as well. Supply is expected to be lighter than normal and firm markets through Christmas, force

majeure declarations remain in place by many regional growers, but conditions are slowly improving.

- **Roma Tomatoes: ESCALATED** We are still facing escalated markets and demand is strong being the round market is still quite volatile. We expect this condition to continue through December and hope to retreat once we see more rounds available in South Florida.
- **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 but expect tight markets through December
- **Organic Tomatoes: EXTREME** Extremely limited supply available.

## Mexico

- **Round Tomatoes: ESCALATED** A combination of lighter demand, an uptick in round crossings as well as additional roma volume coming available has put downward pressure on the round market. We still face several challenges over the next few weeks until we see a full transition to Sinaloa but there is a light at the end of this tunnel. We expect volatile markets through the end of the year.
- **Roma Tomatoes: ESCALATED** While supply is better on roma than the rounds; we are still facing the potential for escalated markets. Good news is we are seeing an increase in crossing of new crop romas in both McAllen and Nogales. We hope to see a downward trend on price and increased supply as well as quality over the next several weeks.
- **Grape Tomatoes and Cherry Tomatoes: EXTREME** 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 and excellent quality continue out of Mexico and Canada.
- **Tomato on the Vine:** Excellent quality and supply available.

## 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.