

JALISCO, MX

Thu 8/31	Fri 9/1	Sat 9/2	Sun 9/3	Mon 9/4	Tue 9/5	Wed 9/6	Thu 9/7
79° 65°F	75° 64°F	81° 66°F	84° 66°F	81° 66°F	80° 66°F	82° 66°F	82° 66°F
Scattered Thunderstorms	Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms	Scattered Thunderstorms	Thunderstorms
12 AM 1.54 in	0.39 in	0.15 in	0.13 in	0.32 in	0.26 in	0.36 in	0.49 in

VIZCAINO, BAJA SUR

Thu 8/31	Fri 9/1	Sat 9/2	Sun 9/3	Mon 9/4	Tue 9/5	Wed 9/6	Thu 9/7
98° 76°F	96° 73°F	95° 69°F	91° 64°F	89° 62°F	92° 63°F	96° 66°F	100° 68°F
Partly Cloudy	PM Thunderstorms	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Sunny
2 AM 0 in	0.06 in	0 in	0 in	0 in	0 in	0 in	0 in

ARVIN, CA

Thu 8/31	Fri 9/1	Sat 9/2	Sun 9/3	Mon 9/4	Tue 9/5	Wed 9/6	Thu 9/7
102° 67°F	93° 65°F	92° 65°F	82° 64°F	86° 66°F	94° 69°F	95° 70°F	96° 71°F
Sunny	Mostly Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Sunny
AM 0 in	0 in	0 in	0 in	0 in	0 in	0 in	0 in

HENDERSONVILLE, NC

Thu 8/31	Fri 9/1	Sat 9/2	Sun 9/3	Mon 9/4	Tue 9/5	Wed 9/6	Thu 9/7
81° 59°F	77° 56°F	81° 57°F	84° 60°F	87° 62°F	88° 63°F	88° 64°F	87° 63°F
Mostly Sunny	Partly Cloudy	Partly Cloudy	Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny

Good Buy

Each week, our team spotlights commodities based on how favorable prices, quality, and supply are in the market. Stay ahead of the trends and look to these good buys for their stellar performance in the fields! Please see each individual product for more information below and reach out to your PA representative for more information on adding this to your order guide.

Commodity	Expert Tip
California Celery Liner Lettuce Green Bell Pepper	California Celery, Liner Lettuce and Green Bell Peppers are all a Good Buy this week, with good supply and demand. To use all three items, consider making a Celery Salad with roasted peppers. Celery adds the perfect bite to a salad and roasted peppers pack a ton of flavor! Mix these items together, top with walnuts, herbs, mozzarella, and your favorite dressing for a refreshing and delicious end-of-summer salad!

Fruits & Vegetables

Avocados: EXTREME (48 counts and larger) Last week closed at 48.7M pounds for the US, a decrease of 11% from the previous week. Mexico is still 100% Loca fruit. Dry matter tests are being done on the next crop, Aventajada, and expectations are to begin late September for fruit in-market for early October. Harvest is tracking higher this week; we'll see more volume available next week. The hurricane event did limit some California orchards from harvesting, but overall volumes would have been similar without the rain, as many southern orchards have completed their season. Total volumes coming in under 5M pounds is a strong signal the season is close to a wrap. Peruvian volumes were similar to the previous week; there's another 1-2 weeks of decent arrivals from Peru until their season comes to an early end. As previously discussed, excessive heat led to fruit dropping from trees and not sizing up as in seasons past.

Bananas: Steady volume on the horizon expected and no quality issues; fruit size will remain smaller than normal but should be improving.

Pineapples: ESCALATED We expect to see tighter availability on pineapples through the remainder of the quarter due to a decrease in yields throughout the tropics; most of this can be attributed to the changing of the weather patterns from La Nina to El Nino. As a result of this, many farmers saw their fruiting season start approximately five weeks earlier than normal; factor this with the high drought conditions we are now seeing, the result is some of the lowest fruit production in this current cycle we have seen in years for this time of year. We are also seeing some growers decide to cease operations due to inflationary pressure which is limiting their cashflow for day-to-day farming costs such as labor and fertilizer. Our growers are doing everything they can to navigate through this to ensure we keep the supply chain stable. However, we do feel there might be occasional shortages or pro-rates until we resume a normal availability cycle. We recommend staying in front of this condition by keeping additional inventory on hand as well as planning and placing orders well ahead of time and not on the same day. We hope these adjustments, as well as the ability to be flexible on sizing, will avoid the need to make product substitutions or cause any major shortages. Overall quality remains good.

Table Grapes: ESCALATED Lighter supply and firmer markets will continue. Some growers are reporting 30% plus losses going into their mid-season varieties. We will certainly see volume impacted the remainder of the California fresh and storage season. We do anticipate a shorter than normal season all around and potentially volatile markets in December going into the offshore deal. Growers are doing the best they can to pack the best grapes that were not affected by the rain.

Berries

Strawberries: WATCHLIST Availability will continue to be limited through the month of August. The second push out of Watsonville and Salinas continues to slowly increase, but it is not expected to allow much room for additional business. Santa Maria's fall crop start date is expected to start the last week of August with no notable volume until mid-September. Berries in Watsonville/Salinas are sizing down, conv 18-22, and organics are 28-32. Crews continue dropping between 30-50% of damaged fruit in both conventional and organic fields to aid in keeping packs clean. Still no reports of any labor shortages which has helped to keep fields rotated in hopes to extend the season and support the growers as long as possible this year.

Blackberries: Watsonville growers are past their initial early season push; we will see volume trend down slightly with limited availability. Mexico's production continues to decrease and will do so until the end of September when the previously pruned crop comes back into play. Watsonville's quality has been great. Very little occurrence of red cell and leaky. Berries are large. Overall, availability will be limited for the next few weeks.

Raspberries: Volume is steady out of both Watsonville and Mexico. Acreage in Watsonville is limited so availability will remain limited. The quality is exceptional with large berries, full ripe salmon color, and meaty texture with classic raspberry flavor. Availability will be limited for the next few weeks.

Blueberries: The Pacific Northwest is coming off-peak production. Demand and pricing are just beginning to turn up ever so slightly, but we expect that will continue to increase over the next 3-5 days. Both Oregon and British Columbia production volumes are coming off significantly over the few several weeks. Peru will not come in as early or with as much volume as last year so this may help to extend seasons out of the Pacific Northwest. Quality has been good in both OR and BC, BC is slightly better with firmer fruit.

California Citrus

Oranges: Valencia's are peaking on 88/113/72 with very good eating quality. As we approach August, we may see some re-greening. Small fruit is expected to remain tight through the valencia season.

Lemons: WATCHLIST Demand continues to be very strong with light supplies, especially on Fancy grade and small sizes. Please be sure to provide plenty of lead time on orders. Argentina and Chile are expected to finish early this season and D3 is scheduled to start in early to mid-October.

Limes: ESCALATED Mexico has experienced heavy rain from tropical storm Harold and Hurricane Hilary, which is impacting South Texas and Northern Mexico. In addition, significant rain throughout all areas of Mexico is causing a supply shortage. Rain, extreme heat and humidity has impacted quality and shelf life, which is ultimately contributing to low yields/availability. The crop has transitioned to the new production cycle in most operations although overall crossings have declined. Peak sizing consists of small fruit, including 230's & 250's; large fruit will remain limited in availability. *Pricing may fluctuate based on prevailing supply and demand.*

Grapefruit: Star Ruby Grapefruit is being packed in Riverside and the central valley. Currently peaking in a 56/48/40.

Imports/Specialties: Imported mandarins on both the east and west coasts.

West Coast Lettuce

Iceberg: Supplies this week are steady to slightly higher with good volume through next week with good quality. The forecast is for steady prices at current levels with no major changes predicted.

Romaine, Romaine Hearts: The quality and condition of Romaine and Romaine Hearts has been good although we continue to see small amounts of tip burn. The tip burn will continue with the warmer weather ahead. Growers are doing their best to mitigate this at the harvesting level. As a result, we have seen some lighter than normal weights. We will continue to see steady volumes into next week. The market is steady on both carton romaine and romaine hearts.

Green Leaf, Red Leaf & Butter: Supplies are good with very good quality. The market is steady and will remain steady into next week.

Eastern and Western Vegetables

Green Bell Pepper: Steady volume out of California, the east coast volume is steady out of North Carolina and Michigan. Overall quality is good.

Red Bell Pepper: Markets have firmed up and supply is lighter this week. Good supply on 11# fruit crossing through Texas, but demand is stronger. Quality remains strong. Good supply and quality crossing through Canada.

Yellow Bell Pepper: Markets have firmed up and supply is lighter this week. Good supply on 11# fruit crossing through Texas but demand is stronger. Quality remains strong.

Orange Bell Pepper: Markets have firmed up and the supply is lighter this week. Good supply on 11# fruit crossing through Texas, but demand is stronger. Quality remains strong.

Mini Sweet Pepper: Light supply this week loading in Nogales.

Mixed Chili Pepper: EXTREME In the east, the hot pepper market is hit or miss out of Michigan. On the mainland of Mexico, we are still dealing with heat, cloudy conditions and transitional gaps on chillies and tomatillo, which is keeping prices firm on several varieties. There is some volume out of Baja which seems to be improving post-Hilary. California production is also hit or miss at this time.

Eggplant: Good quality and supply out of Michigan and other local regions.

Slicer Cucumbers: WATCHLIST In general, the volume was lighter this week and markets ticked up. Baja volume will be lighter post-Hilary for the next few weeks. North Carolina and some of the other local deals, like Michigan, continue to see stable numbers. Overall, the quality is good.

English Cucumbers: Good supply available with excellent quality.

Pickles: Lighter supply out of Michigan this week and quality will be mixed.

Green Beans: ESCALATED Markets are very short and there is a wide range of quality by region. California is short due to rain and wind damage from Tropical Storm Hilary.

French Beans: WATCHLIST We continue to see weather-related quality issues as rain in Guatemala has affected shelf life.

Zucchini/Yellow Squash: Markets are snug this week out of North Carolina, Michigan, and Tennessee in the east. In the west, we continue to cross supply in McAllen and Nogales is slated to start in October. Fresno and Santa Maria are seeing lower numbers on Italian and yellow.

Herbs

Chervil remains limited in supply and growers are doing the best they can to fill 100%. Italian Parsley can be used as a substitute and fresh Tarragon at ½ the amount. Weather continues to affect all herbs from Colombia.

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: Cantaloupe quality is excellent with high shell color and very minimal rind with outstanding internal color. The brix levels are averaging 14-16%. Sizing is trending mostly to regular 9/9JS and supply is light.

Honeydew: Honeydew is peaking on 5's with 6-8's being very limited. Quality is outstanding with clean and smooth skin, and brix levels averaging 13-15%.

Watermelon: Markets will be tight this week as many local deals peak and California is still assessing the impacts of Hilary. Overall quality is good out of Michigan, Virginia, North Carolina, and Illinois.

Mixed Vegetables

Artichokes: Supplies continue to improve, especially on larger sizes, market remains active.

Arugula: Supplies are good with very good quality

Asparagus: **EXTREME** Hurricane Hilary slowed down production in Baja, Mexico, and has caused significant logistical issues. The effects of El Niño continue in all Mexican and Peruvian growing regions. Production is still very heavy on small and standard sizing. Markets continue to be short on Large, XL, and Jumbo sizes. Mexican and Peruvian quality is fair at best.

Bok Choy: Supplies are increasing with very good quality.

Broccoli/Broccoli Crowns: Steady supplies on crowns/ bunch through next week. The quality and condition are good. The market is expected to stay steady.

Broccolini: Good supplies with very good quality. Demand remains strong.

Brussels Sprouts: **ESCALATED** The sprout market should continue to remain strong into this coming week with no significant changes in the supply picture. The spot market on 25lb bulk packs continues to hold in the \$50 range with good quality and strong demand.

Carrots: (JUMBOS) ESCALATED Overall supplies are good but, Jumbos are still slow getting ramped up. Quality is good.

Cauliflower: **WATCHLIST** We are seeing lighter supplies with very good quality. Expect an increase in the market over the next week as demand is increasing as we head into September.

Celery: We are in the peak of the season in the Salians Valley on Celery with very good supplies and quality.

Cilantro: **ESCALATED** Cilantro supplies are anticipated to be lighter than normal this week. We are expecting lighter supplies to continue into next week.

Corn: WATCHLIST Corn markets are mixed as some crops in the west were damaged by Tropical Storm Hilary. In the east, we are seeing stable markets and good quality.

Fennel: Supply is better, quality is very good.

Garlic: The 2023-2024 California Garlic season has started. The Market continues active as supplies ramp up, quality is looking good.

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: Supplies continue to improve with very good quality. Demand is good.

Green Onions: EXTREME Green onions remain in extremely short supply with marginal quality due to the effects of the extreme heat through the summer and Hurricane Hilary moving through the growing areas. Most shippers are in a Demand Exceeds Supply situation and need to pro-rate to get orders shipped. We expect this current situation to continue through the month of September, possibly into October when new fields can be harvested.

Mushrooms: Quality is good, and supply is stable.

Napa Cabbage: ESCALATED Supplies are still very light, and the market remains very active.

Parsley (Curly, Italian): ESCALATED Quality is improving, market remains active.

Rapini: Good supplies with very good quality.

Red Cabbage: Supplies continue to increase with very good quality. Pricing continues to adjust down.

Spinach (Bunched & Baby): Good supplies and good quality.

Spring Mix: Supplies are good with very good quality.

Snow Peas and Sugar Snaps: ESCALATED Guatemala's production of both peas continues to improve. Peruvian pea quality and production are excellent. Out of the west, snow pea supply is improving, but markets remain active with good demand and fair to good quality. Sugar snap supply is low out of California.

Onions

The market is in the middle of transition now. The only color we are seeing any major movement and tight supply on is white onions. We may begin to see Colossal and Super Colossal yellows tighten up, as the early Northwest product traditionally does not size very big to start out. California appears to have plentiful amounts of big onions to finish out the remainder of their crop. The short-term concern right now is surrounding medium and jumbo yellow onions. There is a going to be a voluminous amount of supply coming all at once in the coming weeks as more growers in both Washington and Iowa ramp up their supply. Red onions should do ok at maintaining their current price levels as it appears a lot less were planted this season than last year where we saw the Pacific Northwest finish with a heavy surplus of them. Both Idaho and Washington have been extremely hot over the last week, which is causing some stress on the plants and preventing the bulbs from sizing up. This is taking place a lot later than we saw last season, and all reports are that both supply and quality should be much improved over last year's crop. Idaho is expected to get a good bit of rain on Sunday/Monday, which could delay harvest for some growers as well. We will likely not see the market settle out until California and New Mexico finish packing what they have left. Trucks are beginning to tighten up some, and with fuel increasing and school demand back up, we are beginning to see rates climb.

Potatoes: ESCALATED

The bulk of the potatoes being shipped are now new crop Norkotahs. There is very little old crop Burbanks left to speak of in Idaho. We are seeing the market fall fast out of all shipping regions as new crop has brought a lot of supply on board at once. Because these potatoes have not been through the sweat yet, they must be shipped and cannot be stored. We are unlikely to see the market regain its footing until sometime in the middle to end of September. We are seeing Washington's early potatoes sizing on the larger range – so 40ct through 70ct have been plentiful, and there have been a lot of straight load deals. In Idaho, tuber counts are high, which tells us that yields are strong. The unknown there will be how the crop is sizing overall. Due to the high levels of heat, they have experienced over the last several weeks, it is possible we see smaller potatoes more plentiful this season. The outlook remains optimistic this season on yields, sizing, and quality. Barring any unforeseen weather events that would negatively impact harvest or storage, the industry should be in for some much-needed relief on fresh potatoes this season. Trucks are beginning to tighten up some, and with fuel increasing and school demand back up, we are beginning to see rates climb.

Tomatoes: East Coast

- **Round Tomatoes:** Steady volume on all sizes as the weather improves. Forecast is calling for normal conditions, which will make for favorable harvest conditions. Fruit in general looks good; we are seeing some quality issues related to rain, but expect that to improve soon.
- **Roma Tomatoes:** Lighter volume this week on all sizes as we see a dip in production, but the forecast does continue to call for favorable harvest conditions over the next week. Fruit in general looks good; we are seeing some quality issues related to rain, but expect that to improve soon.

- **Grape Tomatoes: EXTREME** Grape tomatoes are still short, but availability seems to be improving as more volume comes out of the east.
- **Cherry Tomatoes: ESCALATED** Very light supply available this week.

Tomatoes: Mexico

- **Round Tomatoes: WATCHLIST** Markets are mostly flat this week; moderate crossings continue through McAllen and Otay. Overall quality is excellent on new crop fruit. We will need to assess the crops in Baja once Tropical Storm Hilary passes.
- **Roma Tomatoes:** The market firmed up again this week on romas. Baja crossings are being assessed post-Hilary. Quality is generally good.
- **Grape Tomatoes: EXTREME** Crossing were still light in McAllen and Otay, but demand is also softening as well. We will expect to see a slow retreat in volatile market conditions over the next two weeks.
- **Cherry Tomatoes: ESCALATED** Very light crossing this week, and we continue to see stronger pricing and good demand on the horizon. Overall quality is good.
- **Medley Grape Tomatoes: ESCALATED** Lighter volume this week with fair quality.
- **Tomato on the Vine:** Excellent quality available. Supply was tighter this week and prices were up due to increased demand.
- **California Tomatoes:** Steady volume and overall quality- hit and miss.

APPLES

Apples: Washington State Apple Crop looks to be around 100M boxes vs. 122M the last two years and 132M 3 years ago. With the number of Trees in the ground – this number is shocking. The last crop we saw 100M boxes was in 2007. Mid-April 2022 – Eastern Washington experienced 20-degree temperatures with apple trees in bloom which caused a significant loss in the crop. Additionally, cooler temperatures in the Spring with extreme Summer Temps also played a negative role in the supply of apples combined with two devastating hailstorms causing some blocks of Orchards not to be harvested. Furthermore, Fujis and granny smiths are known for alternate-bearing crops. Last year were heavy crops, so this year both are down significantly.

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. Cooler temperatures in the Spring with extreme Summer Temps also played a negative role in the supply of pears combined with two devastating hailstorms causing some blocks of Orchards not to be harvested.

Stone Fruit

Apricots: Supply is light, and the season is winding down out of Washington.

Cherries: Steady availability out of Washington and Canada.

Figs: Supply will be limited and finish up for the season early due to the impact of Tropical Storm Hillary.

Peaches: Markets out of California will wrap up sooner than expected due to the impacts of Tropical Storm Hillary; Washington continue to harvest fruit as well as some local deals. The peach season should wrap up over the next two to three weeks.

Nectarines: Markets out of California will wrap up sooner than expected due to the impacts of Tropical Storm Hillary; Washington continue to harvest fruit, but the season should wrap up over the next two to three weeks.