



Weekly Market Review

September 7, 2023

Overview

We are working with our Southeastern growers to assess damages by Hurricane Idalia this week in South Georgia and North Florida, and we expect to see some volatile markets. Florida saw some losses in citrus and some local crops. Areas of concern in the transition period are the following items grown in South Georgia: Mixed citrus, squash, cucumbers, tomatoes, corn, hot pepper, and bell pepper. In general, markets are strong on cucumbers and the hot pepper and tomatillo market remains very active between weather related pressure, late starts and supply gaps. We hope to see markets improve over the next several weeks out of Mexico which should bring some relief to the market. Grape tomato markets are improving, and cantaloupe and honeydew production were interrupted slightly by Hurricane Hilary but have rebounded to projected yields. Pineapple remains short and we expect this to continue through October. It is too early to call if post-Labor Day will produce a lull or a strong pull with avocados, but inventories are at a good level, and field pricing is stable. The 60s and smaller seem to have settled in, and the wild card remains with 40s and 48s. Mexico crop transition from Loca to Aventajada has historically caused disruptions, and late September could quickly become volatile as all of U.S. demand shifts back to Mexico. Once this crop transition is smoothly underway, we can expect a calm Q4.

Market Alert

- Avocados (48cts & larger)– **EXTREME**
- Asparagus – **EXTREME**
- Bok Choy – **ESCALATED**
- Brussels Sprouts – **ESCALATED**
- Carrots – **ESCALATED**
- Green Beans - **ESCALATED**
- Ginger – **EXTREME**
- Green Onions - **EXTREME**
- Hot Pepper (All Varieties & Tomatillo) – **EXTREME**
- Limes – **ESCALATED**
- Napa – **ESCALATED**
- Onions – **ESCALATED**
- Parsley (Curley & Italian) – **ESCALATED**
- Pineapple- **ESCALATED**
- Potatoes – **ESCALATED**
- Snow & Sugar Snap Peas – **ESCALATED**
- Table Grapes - **ESCALATED**
- Tomatoes – **ESCALATED**

Watch List

- Blackberries
- Cauliflower
- Eggplant
- Lemons
- Oranges (small sizes)
- Slicer Cucumber
- Strawberries
- Raspberries
- Soft Squash (Green & Yellow)
- Tomatoes (Mexico)
- French Beans

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









SALINAS, CA

Thu 9/7	Fri 9/8	Sat 9/9	Sun 9/10	Mon 9/11	Tue 9/12	Wed 9/13	Thu 9/14
71° 54°F	73° 54°F	75° 56°F	74° 55°F	72° 58°F	68° 57°F	68° 57°F	68° 57°F
AM Clouds/PM Sun	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	AM Clouds/PM Sun	Partly Cloudy	AM Clouds/PM Sun









OXNARD, CA:

Thu 9/7	Fri 9/8	Sat 9/9	Sun 9/10	Mon 9/11	Tue 9/12	Wed 9/13	Thu 9/14
74° 59°F	76° 63°F	79° 68°F	79° 65°F	78° 63°F	74° 61°F	71° 60°F	70° 59°F
Sunny	Partly Cloudy	Partly Cloudy	AM Clouds/PM Sun	Partly Cloudy	Partly Cloudy	AM Fog/PM Sun	Mostly Sunny









JALISCO, MX

Thu 9/7	Fri 9/8	Sat 9/9	Sun 9/10	Mon 9/11	Tue 9/12	Wed 9/13	Thu 9/14
77° 65°F	83° 67°F	88° 68°F	86° 67°F	85° 67°F	83° 67°F	83° 68°F	85° 68°F
							
Scattered Thunderstorms	PM Thunderstorms	Mostly Sunny	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms	Isolated Thunderstorms









VIZCAINO, BAJA SUR

Thu 9/7	Fri 9/8	Sat 9/9	Sun 9/10	Mon 9/11	Tue 9/12	Wed 9/13	Thu 9/14
102° 73°F	100° 71°F	96° 69°F	103° 74°F	103° 72°F	101° 69°F	97° 66°F	94° 64°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

ARVIN, CA

Thu 9/7	Fri 9/8	Sat 9/9	Sun 9/10	Mon 9/11	Tue 9/12	Wed 9/13	Thu 9/14
95° 66°F	95° 70°F	96° 74°F	91° 72°F	94° 71°F	94° 68°F	91° 68°F	89° 67°F
							
Sunny	Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Sunny	Sunny

HENDERSONVILLE, NC

Thu 9/7	Fri 9/8	Sat 9/9	Sun 9/10	Mon 9/11	Tue 9/12	Wed 9/13	Thu 9/14
83° 63°F	83° 64°F	75° 62°F	74° 60°F	81° 60°F	80° 61°F	76° 59°F	71° 55°F
							
PM Thunderstorms	Partly Cloudy	Thunderstorms	Thunderstorms	Partly Cloudy	PM Thunderstorms	Scattered Thunderstorms	Showers

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
Fennel	Both fennel and its seeds are packed with nutrients including fiber, vitamin C, calcium, iron, magnesium, and potassium. When picking out fresh fennel, look for firm bulbs with bright green tops and leaves. Fennel tends to be a popular ingredient in salads and pastas, but it also makes a good flavoring for fish, chicken, and sausage.

Fruits & Vegetables

Avocados: EXTREME (48 counts and larger) Last week closed at 49.6M pounds for the U.S. like the previous week, but Peru and California are declining while Mexico's volume is picking up. Mexico is still 100% Loca fruit, and Aventajada is trusted to seamlessly enter the market, while CA and Peru exit in late September/early October. Harvest is tracking similarly to last week, and expectations are for totals to remain near 50M pounds of volume for this week. Volumes are winding down, with only 2.6M pounds harvested last week in California. Small numbers will continue to be reported for a few more weeks until the season is officially closed. The 2023 season projected 233M pounds of HASS avocados; to date, we've seen 211M pounds of HASS (other varieties excluded). Similar volumes as 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 Watsonville volumes will continue to decline as growers transition to the Santa Maria growing region. Volumes are expected to ramp up in the Santa Maria region over the next few weeks. The overall quality is good but should continue to improve as the growers ramp up.

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. Overall, availability will be limited for the next few weeks.

Raspberries: Volume is steady out of Mexico and Watsonville volumes are lighter. Mexican and Guatemalan production should continue to increase weekly, but quality from Guatemala has been subpar.

Blueberries: Due to seasonality, Michigan, New Jersey, and British Columbia have started to close fields. Argentina's production is low due to cold temperatures in the growing region. 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 OR and BC; BC is slightly better with firmer fruit.

California Citrus

Oranges: Valencias are peaking in an 88/72. 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. Argentina and Chile are expected to finish early this season and D3 is scheduled to start in early to mid-October.

Limes: ESCALATED Significant rain throughout all areas of Mexico is causing a supply shortage. Rain, extreme heat, and humidity has impacted quality and shelf life, which contributes to low yields/availability. Crop has transitioned to the new growing areas although overall crossings continue to decline. Market continues to be very strong.

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 continue to be steady with good volume continuing into 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 chilies 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 remains hit or miss at this time.

Eggplant: WATCHLIST We are seeing a split market with tight supply in the west, and moderate supply in the east. Quality is fair in general.

Slicer Cucumbers: WATCHLIST Overall volume remains lighter than normal. Baja crossings will be lighter post-Hilary for the next few weeks while in the east North Carolina and some of the other local deals, like Michigan, continue to see lighter numbers than projected. 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 mixed, and there is a wide range of quality by region.

French Beans: WATCHLIST Quality has improved this week, but production is down due to heavy rain from a couple weeks ago. Light supply of conventional out of Mexico.

Zucchini/Yellow Squash: ESCALATED Good demand and lighter volume continue to keep prices higher this week. North Carolina, Michigan, and Tennessee in the east continue will continue production until first frost while we are still assessing the damages to South Georgia after Idalia. In the west, we continue to cross supply in McAllen and Nogales is slated to start in October. Santa Maria continues to see 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 Logistics in Baja is a problem due to the storm that hit last week. The effect of El Niño continues in all Mexican and Peruvian growing regions. Production is still very heavy on small and standard sizing and 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 broccoli crowns and bunched broccoli starting tomorrow through this weekend. Market tone is good. Although, industry yields will be decreasing in September due to affects from the higher temps/ higher humidity the last few weeks.

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, but we are expecting shippers to be in seasonal volume in about 2 more weeks as volume should ramp up for the fall. Once we get through the next couple of weeks, anticipate much better volume for the balance of the year once we get thru this tight short-term volume we are currently seeing.

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 continue to see good volume with very good quality, but we are anticipating lighter supplies as we move through mid-September with the potential of a stronger market.

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

Corn: 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: Good supplies with very good quality.

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 weather related issues. 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 on both peas continues to improve. Peruvian pea production is excellent, but there may be minor quality issues present. Snow pea supply is improving out of the west. The market remains active with good demand, fair to good quality. Sugar snaps supply is gapping 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.
- **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: ESCALATED** Grape tomatoes are still below normal but are beginning to improve. FOB prices were down this week.
- **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.
- **Roma Tomatoes:** The market firmed up again this week on romas. Baja crossings are being assessed post-Hilary; but are expected to be less through the remainder of summer. Quality will be hit and miss for the next several weeks out of Baja.
- **Grape Tomatoes: ESCALATED** Crossings are gradually improving out of McAllen and Otay. Overall quality is good off the mainland crossing in McAllen while still hit and miss in Otay from the Baja.
- **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; sizing is peaking on large and xl's.

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: Done for the season.

Cherries: Mostly done for the season 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.

Plums: Still some late variety red and black varieties available out of California.

Peaches: Mostly done for the season out of California; there are some lingering inventories out there but those should wrap up quickly.

Pomegranates: Early Granada varieties available in the west.

Nectarines: Mostly done for the season out of California; there are some lingering inventories out there but those should wrap up quickly.