

























JALISCO, MX

Thu 10/5	Fri 10/6	Sat 10/7	Sun 10/8	Mon 10/9	Tue 10/10	Wed 10/11	Thu 10/12
82° 65°F	83° 67°F	83° 66°F	80° 66°F	79° 65°F	76° 64°F	77° 63°F	76° 63°F
 PM	 Scattered	 Scattered	 PM	 PM	 Thunderstorms	 Thunderstorms	 Scattered
Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms			Thunderstorms









VIZCAINO, BAJA SUR

Thu 10/5	Fri 10/6	Sat 10/7	Sun 10/8	Mon 10/9	Tue 10/10	Wed 10/11	Thu 10/12
99° 66°F	102° 69°F	102° 71°F	101° 69°F	96° 67°F	94° 63°F	86° 62°F	90° 62°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Partly Cloudy	Sunny









ARVIN, CA

Thu 10/5	Fri 10/6	Sat 10/7	Sun 10/8	Mon 10/9	Tue 10/10	Wed 10/11	Thu 10/12
95° 66°F	96° 67°F	99° 70°F	97° 68°F	91° 61°F	80° 60°F	76° 61°F	89° 64°F
							
Sunny	Sunny	Mostly Sunny	Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny

HENDERSONVILLE, NC

Thu 10/5	Fri 10/6	Sat 10/7	Sun 10/8	Mon 10/9	Tue 10/10	Wed 10/11	Thu 10/12
75° 58°F	76° 49°F	61° 41°F	61° 39°F	67° 46°F	71° 46°F	71° 48°F	73° 53°F
							
Partly Cloudy	Partly Cloudy	Sunny	Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy

ADEL, GA

Thu 10/5	Fri 10/6	Sat 10/7	Sun 10/8	Mon 10/9	Tue 10/10	Wed 10/11	Thu 10/12
86° 65°F	84° 65°F	78° 50°F	73° 48°F	77° 52°F	82° 58°F	80° 61°F	79° 65°F
							
Mostly Sunny	AM Clouds/PM	Mostly Sunny	Mostly Sunny	Sunny	Mostly Sunny	Mostly Cloudy	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
Round Tomatoes Red Bell Pepper	It is SOUP SEASON! Hello fall, we are ready for all things roasted... and blended! Roast tomatoes, onions and peppers on a baking sheet and then wait for them to cool and blend. Next add it to a pot and season with salt, pepper, and a drizzle of olive oil! Enjoy with a side of... grilled cheese, YUM! ☺

Fruits & Vegetables

Avocados: Escalated Last week closed at 58.7M pounds for the U.S., with Mexico's volume very similar to the previous week. The Aventajada crop is now widely harvested and is quickly becoming the majority of volume crossing into the U.S. With this change, the ripening and eating characteristics of the fruit are unchanged, but the size curve is affecting the market. There is a higher percentage of 48s & larger coming off the trees, and the pricing gaps between large sizes are narrowing.

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: EXTREME Lighter supply and firmer markets will continue. Some growers are reporting 30%+ losses going into their mid-season varieties and we are starting to receive Force Majeure letters. We will certainly see volume impacting the remainder of the California fresh as well as storage season. We do anticipate a shorter than normal season all around and potentially volatile markets until the offshore deal gets underway. Growers are doing the best they can to pack the best grapes that were not affected by the rain, but we do expect to see quality issues. We are anticipating a supply GAP between December and January therefore ask you prepare by scaling back portions and consider sub to other options such as diced apples, or mixed melon chunks during that estimated timeline.

Berries

Strawberries: Fruit quality out of Oxnard, CA is currently excellent, ranging from 95% to 100% color. However, there are some instances of misshapen fruit and crews are throwing down about 5-10%. Conventional counts range from 15-18. Growers are not harvesting daily at this point, and the volume is very light. We anticipate that the volume will start to increase in the middle of October. Santa Maria has warmed up to the high 70s to low 80s during the day, with nighttime temperatures in the high 50s. As for conventional fall crop counts, there is a variation from ranch to ranch, with some ranging from 14-18 counts and others 18-24 counts. The challenge growers are facing is dealing with overripe and pin rot issues due to damp mornings. Crews are currently dropping about 15-20% to maintain a clean pack.

Blackberries: Crews continue fighting attached calyx in the Watsonville growing region. Harvests are maintaining steady for this week, but we anticipate a decline in the coming weeks. Quality out of Mexico remains high, with only sporadic occurrences of red cell. Volume remains consistent until mid-October and then begins to increase.

Raspberries: Harvests saw a noticeable decline this week out of Watsonville, CA. The quality remains good, with only sporadic instances of overripe fruit. Harvests are showing a slight decrease in Mexico, but we anticipate an uptick in week 42. The quality remains high, with only occasional instances of overripe or crumbly tips. Organic volume is currently limited but expected to increase in week 40.

Blueberries: Extreme Domestic crops and storage fruit is done for the season. Growers expected to push another week out of British Columbia, but rain ended the season immediately. Mexico's crops are behind, with very little ripe fruit. We expect to see an increase in about three weeks. Peru's volumes are estimated to be 50% lower than anticipated. Between production volume being off and fruit being sent to other countries, we are in a significantly under-supplied situation for the next several weeks.

California Citrus

Oranges: Valencias are peaking on 88's / 72's and small fruit is expected to remain tight through the valencia season. Some shippers are possibly gapping between the end of the Valencia season and the beginning of the navel season with small fruit (88's, 113's and 138's) being in a demand exceeds supply situation. There are going to be Florida oranges available, quality is looking good. Please be sure and book orders early!!

Lemons: WATCHLIST Demand is high on Fancy grade and small sizes will continue to be extremely tight. Expect light supplies through the month of October until D3 gets into full production.

Limes: EXTREME Pricing remains elevated on large sizes, but market has weakened slightly on small. Large sizes remain in a demand exceeds supply situation and we expect this to continue for several weeks. The market is expected to be relatively stable over the next few weeks although demand will dictate. Limes have moved to the new growing areas, although we continue to see the impacts to the new bloom which has been heavily impacted by severe weather events over the last few months. We anticipate availability to sharply decline in Q4, with growers reporting supply to be at an extreme low during October. Pricing will continue to climb with a volatile market through Q4, possibly into Q1 2024. In addition, extreme heat and humidity have impacted quality and shelf life, which is contributing to low availability. Quality continues to reach seasonal lows, with growers seeing very low pack-outs of the total harvested yields.

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: Lettuce supplies are steady with good quality. Huron is fast approaching as shippers will start harvesting in Huron the middle of October and the transition from Salinas to Huron looks to be seamless for those shippers that transition from Salinas to Huron. Quality looks good out of Huron as well. Warm weather at the end of the week may impact supplies and the market.

Romaine, Romaine Hearts: Romaine and romaine hearts are still shipping from the Salinas Valley. Supplies will remain steady with good quality. We are still getting reports of some light to moderate tip-burn, but overall quality is good on both carton romaine and romaine hearts. Market is steady to slightly stronger. Huron will be starting the middle of the month of October.

Green Leaf, Red Leaf & Butter: Production in Salinas is steady with good supplies. Weights are slightly lower with some light insect presence and light fringe burn but overall quality is good. Current market is slightly stronger with good demand. Huron will be starting the middle of the month.

Eastern and Western Vegetables

Green Bell Pepper: Lighter volume out of California this week as the season starts to wrap up along the coast. In the east coast volume is lighter out of Michigan and North Carolina, those seasons will start to close over the next ten days. South Georgia should start scratching over the next 10-14 days. We should see green pepper crossing through Nogales over the next three weeks. Overall quality is good.

Red Bell Pepper: Excellent quality and volume available out of California as our growers are into newer blocks of fall pepper.

Yellow Bell Pepper: Excellent quality and volume available out of California as our growers are into newer blocks of fall pepper.

Orange Bell Pepper: Markets are steady. Quality remains strong.

Mini Sweet Pepper: Excellent supply this week loading in Oxnard.

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. which is keeping prices firm on several varieties. Serrano, poblano and habanero seem the shortest and there is some volume out of Baja which seems to be improving post-Hilary. California production remains hit or miss currently.

Eggplant: Markets are good, and supply is stable out of Michigan and South Georgia. Quality is mostly fair.

Slicer Cucumbers: Good volume and quality available.

English Cucumbers: Markets have firmed up as supply on # 1 fruit is limited. Canada is winding down and Mexico is just scratching. We should see availability improve over the next 3-4 weeks.

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

Green Beans: ESCALTED Markets are mixed, and there is a wide range of quality by region.

French Beans: WATCHLIST Quality and supply continue improving as the weather improves in certain Guatemalan regions. Rain is forecasted for the weekend, though. Light supply and fair quality of conventional out of Mexico.

Zucchini/Yellow Squash: Good supply available out of South Georgia on new crop while local deals in North Carolina, Michigan, and Tennessee continue production. In the west, we continue to cross supply in McAllen and improving numbers daily crossing through Nogales. Santa Maria continues to see lower numbers.

Herbs

Overall quality has improved with better weather. Dill production is still being affected by heat. Due to weather and pest issues, domestic and imported chervil production continues to be low. Italian Parsley can be used as a substitute, and fresh Tarragon at 1/2 the amount.

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

California production will continue to decline then transition to Yuma in approximately 2 weeks. We should see slightly lower yields in the desert in general but are hoping to see good volume out of Mexico on Honeydew during that same period. Once the desert wraps up we will transition to offshore around the 6th of November.

Cantaloupe: Quality is good, and we are seeing a bit more of a green cast on shell color; brix levels were also down averaging 13-15%. Sizing is trending smaller this week, but should even out as our growers break fields over the weekend that look heavier to 6's and 9's.

Honeydew: We are starting to see less volume being packed throughout the industry. Lower production will lead to stronger pricing in the short term and maintain higher levels until Mexican production starts to impact the industry which most likely will not be until the middle of October. Current sizing profiles have been mostly jumbo fruit (4J/5Js), but we expect sizing to slide down very soon.

Watermelon: Markets will be tight this week as local deals start to wrap up. Overall quality is good out of Michigan, California, and Texas.

Mixed Vegetables

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

Arugula: Supplies are good with good quality.

Asparagus: ESCALATED Production continues to be steady from Northern and Southern Baja. We are still seeing seedling and spreading due to the heat in these growing regions. Production in Southern Peru is also steady, and we have started to see bigger sizing due to more fields opening in the South. Markets have come off with better production in Mexico and Peru.

Bok Choy: Supplies are increasing with very good quality.

Broccoli/Broccoli Crowns: ESCALATED Industry supplies continue lighter on broccoli crowns and bunched broccoli. Market is firm at higher prices. Industry yields continue to be lower due to humidity and higher sustained temps this summer.

Broccolini: WATCHLIST Broccolini supplies will continue to trickle up through next week. We expected slightly better supplies this week but haven't really seen it yet but expect much better supply 2 weeks out.

Brussels Sprouts: ESCALATED We continue to see increasing supplies and most shippers will be covering averages which is good as we start to plan for the Holiday season. Sizing is heavier to medium and small, large sizes remain short. Market remains strong although we should see pricing start to settle over the next few weeks.

Carrots: (JUMBOS) ESCALATED Very limited supply on Jumbo Carrots in California and growers are in a demand exceeds supply situation. Fields in the Salinas region is not sizing up. Expect Jumbo carrots to remain in light supply, well into Q1, 2024.

Cauliflower: WATCHLIST Industry volumes are down this week and next due to lower yields. Market reacting quickly to lower supplies and open market may be strong through Thanksgiving pull.

Celery: WATCHLIST Demand has increased significantly with steady supplies and good quality.

Cilantro: ESCALATED Cilantro supplies continue to be lighter than normal this week, but quality is good.

Corn: WATCHLIST We expect to see a split market on price and west coast pricing is significantly higher as the valley crop winds down then transition to the desert and eventually Mexico over the next month. In the east, markets are mostly down, but that will change quickly as the summer harvest comes to an end in the upper Midwest and New York. We have new crop out of Iron City, GA which will bridge back to Florida for the winter. We expect markets to firm up as supplies in the east tighten. Quality will change as we transition from the summer crop to fall crop; generally, you will see smaller ears and less developed kernels.

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: Supplies and market are steady

Green Cabbage: Supplies are steady with very good quality and demand is good.

Green Onions: EXTREME Green onions continue to remain in extremely short supply with marginal quality due to weather related issues over the summer. Most shippers are in a demand exceeds supply situation and need to pro-rate to get orders shipped. We are hearing of a "SLIGHT" increase in supplies, but we expect this current situation to continue into mid-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: Watchlist Supplies are steady with good quality and demand is good.

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

Spring Mix: Supplies are good with very good quality.

Snow Peas and Sugar Snaps: ESCALATED Out of Mexico, snow pea supply is steady, and the market is high with fair to good quality. Sugar snap supply is gapping out of California, and the market is very active.

Onions

The market appears to have settled out in Northwest. While California is down to only a few shippers, they are still showing a presence on the USDA Market Report. For the most part, everything is coming out of the Northwest. White onions remain in tight supply and their elevated price is reflective of that. We are seeing much better size on yellows in the Northwest as well, with Colossal and Super Colossal sizes being in good supply. To the surprise of many, the market has remained relatively stagnant across the board on all colors and sizes. It was expected to come down pretty fast with the typical tidal wave of new supply entering the market all at once. This season, there has been enough rain delay during harvest that has made the volume much more manageable from a shipping standpoint. It is believed that next week growers will hit their harvest stride and supply could become much more plentiful in both Idaho/Oregon and in Washington. Barring any unexpected weather setbacks, there are no major headwinds expected in this year's

Pacific Northwest onion crop. Truck rates continue to increase back to more healthy rates as well and should continue to remain firm or increase as we move into Q4.

Potatoes: ESCALATED

We are beginning to see some stability in the market at the current price levels. Even though potatoes have not been through the sweat yet, and cannot be stored, there is not much room left for the market to fall. Growers will likely have the luxury of being able to turn down prices if they are too low and focus on storing. 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. Truck rates continue to increase back to more healthy rates as well and should continue to remain firm or increase as we move into Q4.

Tomatoes: East Coast

- **Round Tomatoes:** Volume will begin to decline out of the local regions this week as cooler weather settles in. We should start scratching in Quincy, FL over the next ten days making for a relatively smooth transition south for the winter. Currently, we are seeing a stable supply for all sizes as the summer crop starts to close.
- **Roma Tomatoes:** We are still seeing lighter volume this week for all sizes. Fruit in general looks good, but we are seeing some quality issues related to rain for the remainder of the season. We expect to see new crop out of South Georgia and Florida over the next two weeks.
- **Grape Tomatoes:** Grape tomato supply and quality has improved, and FOB prices were stable this week.
- **Cherry Tomatoes:** Stable supply available this week.

Tomatoes: Mexico

- **Round Tomatoes:** Markets are mostly flat this week, and moderate crossings continue through McAllen and Otay. Overall quality is excellent on new crop fruit.
- **Roma Tomatoes:** The market has eased back on romas with more volume coming available in Mexico. Quality will be hit and miss for the next several weeks out of Baja.
- **Grape Tomatoes:** Excellent supply crossing through McAllen and Otay as growers start fall production. Overall quality is good off the mainland crossing in McAllen while still hit and miss in Otay from the Baja.
- **Cherry Tomatoes:** Stable supply and good quality available this week.
- **Medley Grape Tomatoes:** Stable 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:** Volume is on the decline and the season should close over the next 2-3 weeks.

APPLES

Apples: We will see excellent availability now through the new year on appl 6 es as growers continue harvesting the new crop. Apple supplies are anticipated to be 30% higher than last year. Growers are seeing higher percentages of extra fancy and premium apples.

Pears: We will see excellent availability now through the new year on pears as growers continue harvesting the new crop. Unfortunately, pear supplies are expected to be slightly lower than last year but will be plentiful through Q4.

Stone Fruit

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

Pomegranates: Early Granada varieties available in the west.