

Weekly Market Review

October 27, 2023

Overview

Stable supply out of the Southeast on squash, cucumbers, and bell pepper. Tomatoes supplies are lighter as we approach November; with Florida scratching and the rain events this past week in Mexico, volume is down and could make for some active markets between now and Mid-January. The California season is finishing up over the next week while we expect the early fall and winter programs out of Central Mexico to increase over the next three weeks. Grape tomatoes seem to be the shortest still. Hot pepper will be very active over the next several weeks, Habanero, Poblano and Serrano seem to be the shortest. We expect blueberry supplies to improve out of Peru in mid-November but will then tail off again as we head into December. This is a long-term supply gap and most likely will not be corrected entirely until Chilean arrivals (volume) begin to hit the U.S. ports in late December or early January 2024. Avocado crop estimates call for strong volumes from now through the Super Bowl. As the new year approaches, the sizing curve is expected to peak on 48 counts and larger. Current sizing is peaking on 60 counts.

Guatemala Update: Political unrest continues but seems to be dying down a bit. We are still seeing challenges in the ability to get tropical trade to the ports for export. At this time, there are some commodities being impacted more than others, such as highly perishable like french Beans. Freight and logistics companies in Guatemala are beginning to close until access to the ports is safe. Should this not get resolved soon, we will see this escalate and affect arrivals and unloading at the U.S. Ports which receive Guatemalan products. The following commodities may be affected: **bananas, plantains, french beans, peeled baby carrots, peeled baby carrots tricolor, broccoli florets, snow peas, sugar snap peas, baby squash, and specialty tomatoes.**

Storm Alert: It's been an active season in the western pacific as El Nino ramps up. Tropical Storm Norma made landfall in Sinaloa Mexico bringing up to 18 inches of rain to isolated areas, this will certainly impact the front of the winter season. It's too soon to assess those impacts but we are speaking with our growers daily for updates. Further south, Hurricane Otis brought its separate impacts to Guerrero and Michoacan, will keep you posted as we get any updates from the region.

California: The transition to Yuma is fast approaching as we will see a few items starting out of Yuma the first week of November with most shippers being transitioned the week of November 13th. Please see transition schedule attached to the market report email.

Market Alert









- Avocados – **ESCALATED**
- Asparagus – **ESCALATED**
- Blueberries – **EXTREME**
- Brussels Sprouts – **ESCALATED**
- Carrots – **EXTREME**
- Green Beans- **ESCALATED**
- Hot Pepper (All Varieties) – **EXTREME**
- Limes – **ESCALATED**
- Mushrooms- **ESCALATED**
- Onions – **ESCALATED**
- Potatoes – **ESCALATED**
- Snow & Sugar Snap Peas – **ESCALATED**
- Table Grapes- **EXTREME**
- Grape and Cherry Tomatoes- **ESCALATED**

Watch List









- Blackberries
- Brocolini
- Cabbage, Red
- Corn
- Ginger
- Lemons
- Oranges, small sizes
- Strawberries
- Raspberries
- French Beans

Weather









SALINAS, CA

Thu 10/26	Fri 10/27	Sat 10/28	Sun 10/29	Mon 10/30	Tue 10/31	Wed 11/1	Thu 11/2
66° 46°F	64° 46°F	67° 38°F	71° 41°F	75° 43°F	77° 46°F	74° 48°F	72° 51°F
							
Partly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy









OXNARD, CA

Thu 10/26	Fri 10/27	Sat 10/28	Sun 10/29	Mon 10/30	Tue 10/31	Wed 11/1	Thu 11/2
68° 52°F	69° 51°F	69° 50°F	72° 50°F	73° 52°F	78° 55°F	76° 53°F	73° 54°F
							
Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy









CULIACAN, SIN

Thu 10/26 88° 64°F  Sunny	Fri 10/27 89° 65°F  Sunny	Sat 10/28 90° 65°F  Sunny	Sun 10/29 89° 65°F  Sunny	Mon 10/30 89° 64°F  Sunny	Tue 10/31 89° 65°F  Sunny	Wed 11/1 89° 66°F  Mostly Sunny	Thu 11/2 90° 67°F  Mostly Sunny
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JALISCO, NAYARIT

Thu 10/26 79° 60°F  Mostly Sunny	Fri 10/27 80° 64°F  Partly Cloudy	Sat 10/28 81° 64°F  Isolated Thunderstorms	Sun 10/29 81° 63°F  Mostly Sunny	Mon 10/30 80° 62°F  Mostly Sunny	Tue 10/31 80° 62°F  Mostly Sunny	Wed 11/1 80° 63°F  PM Thunderstorms	Thu 11/2 80° 62°F  Partly Cloudy
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VIZCAINO, BAJA SUR

Thu 10/26 82° 56°F  Sunny	Fri 10/27 84° 56°F  Partly Cloudy	Sat 10/28 85° 58°F  Partly Cloudy	Sun 10/29 83° 56°F  Partly Cloudy	Mon 10/30 87° 55°F  Sunny	Tue 10/31 88° 58°F  Sunny	Wed 11/1 89° 61°F  Sunny	Thu 11/2 89° 61°F  Sunny
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ADEL, GA

Thu 10/26 82° 60°F  Partly Cloudy	Fri 10/27 82° 60°F  Mostly Sunny	Sat 10/28 83° 58°F  Mostly Sunny	Sun 10/29 86° 60°F  Sunny	Mon 10/30 87° 59°F  Mostly Sunny	Tue 10/31 84° 52°F  Mostly Sunny	Wed 11/1 66° 42°F  Mostly Sunny	Thu 11/2 65° 45°F  Sunny
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RUSKIN, FL

Thu 10/26 86° 68°F  Mostly Sunny	Fri 10/27 88° 68°F  Mostly Sunny	Sat 10/28 89° 67°F  Sunny	Sun 10/29 89° 70°F  Mostly Sunny	Mon 10/30 87° 70°F  PM Showers	Tue 10/31 86° 68°F  Partly Cloudy	Wed 11/1 80° 60°F  Partly Cloudy	Thu 11/2 80° 64°F  Partly Cloudy
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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 P.A. representative for more information on adding this to your order guide.

Commodity	Expert Tip
Slicer Cucumber	Cucumbers are a delicious, fresh, and easy snack. Now only do they taste amazing sliced with hummus, ranch, or whatever you would like to dip in, they are rather versatile as well and can be used in cocktails too!

Fruits & Vegetables

Avocados: ESCALATED Last week's total inbound was just under 57.6M pounds, a 50% increase from the previous week. Hurricane Otis made landfall near Acapulco Tuesday night as a Category 5. It dissipated as it headed north through Michoacán. However, there is rainfall in the growing region, which will cause delays in harvest over the next few days. Demand for fruit continues to be strong, and although harvest levels have been strong all last week, the industry is still working on refilling the pipeline from the shortage of 2 weeks ago. The size curve is trending toward 60 counts due to inconsistent sunshine needed to help the fruit grow larger.

Bananas: Steady volume expected through Q4 and quality to be good.

Pineapples: Volume improving out of Costa Rica and quality remains good.

Table Grapes: EXTREME We expect the California season to wrap up in approximately 3 weeks; fortunately, we are starting to see Peruvian fruit at the ports and expect to see high demand and very high pricing. With the Peruvian volume down and the front end of the Chilean forecast down, markets are expected to remain very active through January. We still recommend scaling back portions and consider sub to other options such as diced apples, or mixed melon chunks during that estimated timeline if needed. California quality will be hit and miss while the offshore fruit looks good.

Berries

Strawberries: Oxnard daytime temperatures are in the upper 60s to low 70s, and nighttime temperatures are in the low to mid-50s. There is no rain in the forecast for the next 7-10 days. In terms of fruit quality, it remains generally good with a healthy sheen and vibrant coloring ranging from 90-100 percent. However, misshapen fruit is still prevalent across the field. Harvest crews are diligently working to exclude badly misshapen and undersized fruit from the pack. On foggy mornings, the fruit becomes damp, and the skin is delicate, leading to some bruising issues. Santa Maria highs are in the mid to upper 60s, and overnight lows are in the mid to upper 40s. There's a possibility of rain in the middle of next week. Overall, there have been gradual improvements each week, although challenges persist. The harvest crews are still encountering issues, dropping a significant amount of fruit, mostly small, with some being overripe, soft, crooked, and albino. Florida growers wrapped up plantings late last week. Growers are on track to begin scratching the middle of Nov.

Blackberries: Weather conditions have posed significant hurdles for us in Ziracuaretiro. Weekend rains and intermittent sunny days have made it challenging for growers, especially those who are not covered, impacting their harvesting efforts. Growers' upcoming numbers are contingent on the weather, and we anticipate an increase in productivity in the following weeks if conditions prove favorable.

Raspberries: Currently, the primary challenge revolves around unpredictable weather conditions. Growers continue to revise their estimations for the upcoming weeks due to the impact on several growers. Moreover, some growers are pruning. Looking ahead, we anticipate harvesting from replanted areas in the coming weeks.

Blueberries: Extreme Early weather in the Peruvian season negatively affected crops and subsequent production. Yields are less than 50% from areas, and some crops were utterly wiped out. The El Niño phenomenon brought both extreme heat and windy, wet weather. Supplies out of Peru are expected to improve mid-November but tail off quickly in December. Supplies remain very light out of Mexico, and crops are behind 3-4 weeks. Furthermore, growers saw tropical weather last week that decreased estimates by 30-50%. The markets are not expected to be wholly corrected until Chilean arrivals begin to enter the U.S. in late December or early January.

California Citrus

Oranges: Not many changes on Oranges going through next week as the end of the Valencia season is near and small fruit is expected to remain extremely tight through the end of 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!! The Navel season is expected to get started the last week of October or first week of November in a very light way.

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. Please be sure and book orders early!!

Limes: ESCALATED Demand was off significantly this week, causing some weakness in the market with lower prices. Most shippers are still receiving primarily small fruit, so we are still seeing a significant difference in the pricing between small and large sizes as large sizes remain demand exceeds supply with many shippers. We expect the market to be steady to slightly lower next week but will see market firm back up when the holiday approaches. We still expect lighter supplies to continue through Q4.

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: WATCHLIST Lettuce supplies continue steady, loading out of both Salinas and Huron. We continue to see a few heat related issues from the hot weather in California last week but overall quality looks good. Industry volumes are good while demand remains steady. Expect market to remain steady next week but we expect market to firm up in the coming weeks as we get closer to transition and the Holiday pull.

Romaine, Romaine Hearts: Romaine and romaine hearts are still shipping from the Salinas Valley and Huron. 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.

Green Leaf, Red Leaf & Butter: We expect to see a few heat related issues from the hot weather forecast for this weekend but overall good quality and supplies out of Salinas. Expect market to remain steady through next week.

Eastern and Western Vegetables

Green Bell Pepper: Light volume out of California this week as the season starts to wrap up along the coast. In the local deals are done and South Georgia is seeing very good demand pushing prices higher this week. We should see some green pepper crossing through Nogales as well as out of Coachella over the next three weeks. Overall, the 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 South Georgia on the mainland of Mexico, we are seeing very light volume continue; Serrano, Poblano, and Habanero seem the shortest. There is some volume out of Baja which seems to be improving post-Hilary. California production remains hit or miss at this time. Tomatillo will firm up and quality will be fair at best on all varieties.

Eggplant: Overall quality is good, and markets have firmed up due to limited supply in the west. South Georgia is producing the most volume and we are seeing a few cross in Nogales this week but expect high markets for two weeks.

Slider Cucumbers: Good volume available out of South Georgia and Mexico crossing through McAllen and Nogales. Quality is very good.

English Cucumbers: Markets are easing back as we see more volume crossing from Mexico. Canada is winding down. We should see availability improve over the next few weeks.

Pickles: New crop available out of Florida this week and seeing a few more cross in Nogales and quality is good.

Green Beans: ESCALATED Markets are very strong, and supply is limited out of South Georgia. There are some local beans available by region, however a wide range of quality will be present. This is expected to improve over the next few weeks as we prepare for Thanksgiving.

French Beans: WATCHLIST Supplies in the east remain tight due to protests in Guatemala that did not allow containers to leave the country. However, containers will be arriving, which will help alleviate the pressure on the markets. Supplies are light, and the quality is fair at best out of the West.

Zucchini/Yellow Squash: Good supply available out of South Georgia; local deals are mostly done for the season. Steady volume crossing in McAllen and Nogales and quality is good.

Herbs

Growers were getting ready to harvest this week to kick off the winter season, but this will be delayed about ten days to two weeks. Fortunately, supplies are in three other growing regions, so supplies will be limited, but there will be supplies.

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 is now done, and we have transitioned to Yuma. Offshore season is forecasted to start around November 6th.

Cantaloupe: Cantaloupe production is yielding smaller fruit with above average temperatures over the past few weeks and virus pressure its impacting yields. Sizing continues to be on the smaller scale. Being flexible on sizing will be necessary.

Honeydew: Honeydew supplies remain tight this week out of Yuma but seeing better crossings in Nogales Markets were strong on all sizes with the bulk of the availability in Yuma falling to 4s and 5s. External quality has been good except for a few scars. Internal quality is providing brix levels in the 10-13% range.

Watermelon: Overall quality is good out of California and Mexico.

Mixed Vegetables

Artichokes: Available supplies over the next few weeks will be lighter with very good demand.

Arugula: Supplies are good with good quality

Asparagus: ESCALATED Production continues to be low due to heat in Northern and Southern Baja. Growers are still seeing seedlings and spreading due to the weather. Fields have started to close due to seasonality. Peru's volume is steady, but quality is still fair at best. With more fields opening in the south, we will see larger sizing available starting in seven days. Markets have become very active, with less volume available from Mexico.

Bok Choy: Supplies are increasing with very good quality.

Broccoli/Broccoli Crowns: Supplies have increased; market looks steady going into next week. Some challenges with pin rot and brown bead continue to be present but with good supplies, crews have been able to work through product to ensure the best possible quality.

Broccolini: WATCHLIST Broccolini supplies are light with brown beads and flowering effecting quality. Supplies continue light, although we have not seen the heavy pro-rates we have seen over the last few weeks.

Brussels Sprouts: ESCALATED We are seeing steady supplies, and most shippers will be covering averages. 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 although demand will increase significantly as we head into the holidays.

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

Cauliflower: ESCALATED Industry volumes have increased this week and will be steady next week. Market has trended lower with less demand. Overall quality has been good.

Celery: WATCHLIST Steady supplies with very good quality. We will see some shippers getting started next week in Oxnard for the winter season. Market is steady for now but expect the market to firm up in the coming weeks as we begin the Holiday pull.

Cilantro: Cilantro supplies, and quality are improving.

Corn: WATCHLIST We are seeing an upward tick in pricing as supply in the west is limited, until we transition to the desert. In the east, most local deals are done, and we have transitioned to South Georgia. Quality is good.

Fennel: WATCHLIST Current supplies are light, quality is good. Expect supplies to remain light into next week.

Garlic: The 2023-2024 California Garlic season has started. Quality is looking good.

Ginger: Supplies and market are steady

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

Green Onions: Good supplies with very good quality. As we get into the holiday season, expect some volatility in the market as labor becomes hard to find with workers heading home for the holidays.

Mushrooms: ESCALATED Quality is good, and supply is volatile as growers scaled back some of their production due to lack of demand in recent weeks. We are seeing very short markets on white and cremini mushrooms. We expect the seasonal volatility to further increase as Thanksgiving demand will increase at retail over the next few weeks. Markets will most likely remain volatile through December.

Napa Cabbage: Supplies and quality are improving.

Parsley (Curly, Italian): Supplies and quality are improving.

Rapini: Good supplies with very good quality.

Red Cabbage: Supplies are steady with good quality. 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 Supplies in the east remain tight, due to protests in Guatemala, that did not allow containers to leave the country. However, containers should be arriving, which should help alleviate the pressure on the markets. Out of the west, snow and sugar snaps pea supply is improving with good quality.

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 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 and Roma Tomatoes: WATCHLIST** Volume will begin to decline out of the local regions this week as cooler weather settles in. We started to see some new crop production out of South Georgia and Quincy, FL. Overall quality is good, and we expect to be in South Florida over the next three weeks, however we expect volatile markets through the middle of January.
- **Grape and Cherry Tomatoes: ESCALATED** Grape tomato supply will be short this week, FOB prices will continue to escalate this week. We may see lighter markets for the next two to three weeks.

Tomatoes: Mexico

- **Round Tomatoes: WATCHLIST** Markets firmed up this week as mid-sized and large fruit gets tighter. Overall quality is excellent on new crop fruit.
- **Roma Tomatoes: WATCHLIST** Lighter crossings this week through McAllen and Otay. We are seeing upward pressure on price as volume is light and there was higher demand from the east coast this week for retail. Overall quality is good.
- **Grape and Cherry Tomatoes: ESCALATED** Lighter supply and increased demand from the east has pushed pricing higher this week on volume crossing through McAllen, Nogales and Otay. Overall quality is good off the mainland crossing in McAllen while still hit and miss in Otay from the Baja. We could see stronger markets for the next 2-3 weeks.
- **Medley Grape Tomatoes:** Lighter volume this week with fair quality.
- **Tomato on the Vine:** Stable supply was this week and quality is good.
- **California Tomatoes:** Volume is on the decline and the season should close over the next week.

APPLES

Apples: We will see excellent availability now through the new year on apples 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.

Other Fruit

Pomegranates: Early Granada varieties available in the west.

Persimmons: Fuyu and Hachiya varieties available.