

Weekly Market Review

December 8, 2023

Overview

Light supply on squash and tomatoes, especially on grapes and romas. We should see improvement over the next two weeks but are seeing a possible GAP in roma production out of Mexico over the next ten days. Rounds are fair in supply overall with the shortest availability being on large sized fruit. Excellent supply and quality on green bell pepper and english cucumbers this week. Hot peppers will be very active over the next several weeks with habanero, poblano and serrano the shortest. Table grapes are done out of California and now completely transitioned to offshore production; markets will be firm the month of December and should start to ease back mid-January. December is here which means market stability for avocados. With promotional activity back on track and strong volumes available from Mexico, it's full steam ahead. No change to short-term outlook, but the next several weeks are expected to continue bringing steady market conditions with only minor weekly price adjustments and overall good availability.

Market Alert









- Avocados – **ESCALATED**
- Asparagus – **ESCALATED**
- Basil - **ESCALATED**
- Blueberries – **ESCALATED**
- Broccolini - **ESCALATED**
- Carrots – **EXTREME**
- Hot Pepper (All Varieties) – **EXTREME**
- Mushrooms- **ESCALATED**
- Onions – **ESCALATED**
- Potatoes – **ESCALATED**
- Snow & Sugar Snap Peas – **ESCALATED**
- Table Grapes- **ESCALATED**
- Tomatoes Roma- **EXTREME**
- Tomatoes- Grape and Cherry - **ESCALATED**

Watch List









- Artichokes
- Ginger
- Oranges, small sizes
- Round Tomatoes
- Raspberries
- Strawberries

Weather









YUMA, AZ

Thu 12/7	Fri 12/8	Sat 12/9	Sun 12/10	Mon 12/11	Tue 12/12	Wed 12/13	Thu 12/14
78° 51°F	75° 53°F	67° 48°F	70° 46°F	72° 44°F	72° 44°F	71° 45°F	72° 47°F
							
Sunny	Sunny	Sunny/Wind	Sunny	Mostly Cloudy	Sunny	Sunny	Sunny









OXNARD, CA

Thu 12/7	Fri 12/8	Sat 12/9	Sun 12/10	Mon 12/11	Tue 12/12	Wed 12/13	Thu 12/14
69° 47°F	65° 50°F	73° 52°F	71° 52°F	70° 49°F	67° 50°F	69° 51°F	68° 51°F
							
Mostly Sunny	Sunny	Partly Cloudy/Wind	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Partly Cloudy









CULIACAN, SIN

Thu 12/7	Fri 12/8	Sat 12/9	Sun 12/10	Mon 12/11	Tue 12/12	Wed 12/13	Thu 12/14
93° 61°F	93° 59°F	92° 57°F	94° 56°F	92° 59°F	90° 61°F	90° 60°F	91° 57°F
							
Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Mostly Cloudy	Partly Cloudy	Mostly Sunny









JALISCO, NAYARIT

Thu 12/7	Fri 12/8	Sat 12/9	Sun 12/10	Mon 12/11	Tue 12/12	Wed 12/13	Thu 12/14
78° 58°F	80° 57°F	79° 54°F	83° 60°F	82° 58°F	82° 60°F	80° 60°F	80° 60°F
							
Mostly Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Cloudy	Mostly Cloudy

VIZCAINO, BAJA SUR

Thu 12/7 82° 52°F  Sunny	Fri 12/8 78° 51°F  Partly Cloudy	Sat 12/9 82° 50°F  Sunny	Sun 12/10 83° 48°F  Sunny	Mon 12/11 82° 51°F  Partly Cloudy	Tue 12/12 79° 50°F  Partly Cloudy	Wed 12/13 77° 50°F  Sunny	Thu 12/14 79° 51°F  Sunny
--	--	--	---	---	---	---	---

RUSKIN, FL

Thu 12/7 72° 56°F  Mostly Sunny	Fri 12/8 79° 64°F  Mostly Cloudy	Sat 12/9 83° 66°F  Mostly Sunny	Sun 12/10 81° 52°F  PM Thunderstorms	Mon 12/11 62° 48°F  Mostly Cloudy	Tue 12/12 71° 59°F  Mostly Cloudy	Wed 12/13 74° 60°F  Mostly Cloudy	Thu 12/14 73° 59°F  Mostly Cloudy
---	--	---	---	---	--	---	---

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
English Cucumber & Green Bell Pepper	Throw together a beautiful green goddess salad by slicing up some cucumbers and green bell peppers, additionally you can add green onions and some crumbled feta cheese. Then dress with olive oil, vinegar, and a dash of salt and pepper.

Fruits & Vegetables

Avocados: ESCALATED Last week's harvest came in at 60.6M pounds – a 42% increase from the previous week. The market has been relatively stable the last few weeks. Projections from Mexico show promising volumes for the weeks ahead as we anticipate weekly volumes to average in the mid-to-high 50M pounds range. The size curve coming off the trees shows signs of sizing up as 40s & larger become more available.

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

Pineapples: Steady volume out of Costa Rica and quality remains good.

Table Grapes: ESCALATED Table grapes are done out of California and now completely transitioned to offshore production; markets will be firm the month of December and should start to ease back mid-January. Overall quality is good.

Berries

Strawberries: WATCHLIST California strawberry production is limited to Santa Maria and Oxnard. Both crops are getting late into the season, and shelf life will be limited. Out of Oxnard, the fruit looks promising, with a good sheen and excellent coloring ranging from 90-100% and seeing less misshapen fruit. The primary challenge is pin rot and crews are actively working to clean up the affected plants. For the spring crop, growers are starting to see some hard green fruit and will begin to walk the fields at the end of December. Out of Santa Maria, cold weather is delaying the ripening process, and crews are not seeing much fruit left during the second pass of the week. Out of Mexico, the combination of rain and cold weather is slowing down the increase in volume in this region. The fruit mainly displays full color, but there are still instances of green shoulders and uneven ripening due to the cold weather. Growers are in the fields daily, collaborating with the harvest crews to correct the packs. Despite these challenges, the overall quality remains good. Florida growing region has experienced rain and cold weather, causing a slight setback. Some water damage is visible, but crews actively address and clean it up. Volume is gradually increasing and expect sizing to improve within the next two weeks. Overall, the quality remains good.

Blackberries: With cooler temperatures, quality has seen improvement, the fruit is firmer, and there is a reduction in red cell occurrences.

Raspberries: WATCHLIST Supplies are light, and demand might exceed supply for the next 5-7 days with very limited availability. Quality has been good, although there are green and broken fruit occurrences, along with uneven ripening attributed to the colder weather.

Blueberries: ESCALATED Quality is fair to good out of Peru, but there have been some reports of soft fruit. Production is winding down, and we will soon be transitioning to Chilean production. We expect increasing supplies of Chilean fruit in late December and early January 2024. January- February will be a great time to promote blueberries with ample supplies and good quality. There's been

rain in recent forecasts that has decreased Mexican production temporarily. We expect steady production volume and good quality into the new year.

California Citrus

Oranges: Expect fruit to continue tight as we navigate through the Navel season. Throughout the crop, we are seeing more large sizes and believe small fruit will be extremely tight approaching the new year and beyond.

Lemons: Very good demand and quality. The desert growing region is currently peaking on fancy 140/165s.

Limes: Available supplies continue to increase as demand has declined, market is lower.

Grapefruit: California Grapefruit is being packed in Riverside and the central valley.

Imports/Specialties: Domestic mandarins are available in the central valley of California. Currently peaking in a 28/32 size structure. Pummelos are available in the central valley of Calif, Cara's are starting in a light way. Blood Oranges will be starting soon.

West Coast Lettuce

Iceberg: Supplies are steady, and quality has been good with slightly lower than average weights and size. The market has leveled out and the forecast is for steady prices at current levels.

Romaine, Romaine Hearts: Good supplies with very good quality and the market looks to remain steady through next week.

Green Leaf, Red Leaf & Butter: Good supplies with very good quality and the market looks to remain steady through next week.

Eastern and Western Vegetables

Pepper: Better volume available out of Coachella and Florida this week. Improving numbers crossing through McAllen and Nogales as well. Peaking on large and XL's Overall quality is good.

Red Bell Pepper: Lighter supply available out of California and Baja as our growers are into newer blocks of fall pepper.

Yellow Bell Pepper: Lighter supply available out of California and Baja as our growers are into newer blocks of fall pepper.

Orange Bell Pepper: Lighter supply available out of California and Baja. Quality remains strong.

Mini Sweet Pepper: Lighter 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 currently. Tomatillo will firm up and quality will be fair at best on all varieties.

Eggplant: Overall supply is good out of Florida as well as Nogales. Some lingering supply available in South Georgia. Overall quality is good.

Slicer Cucumbers: Steady volume available out of Florida and Mexico crossing through McAllen and Nogales. Prices were mixed this week due to higher demand. Overall quality is very good.

English Cucumbers: Steady volume crossing from Mexico. Quality is good.

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

Green Beans: Markets seem to be easing back as we see more volume out of Florida and Crossing through Nogales. Overall quality is improving.

French Beans: Production and quality are excellent out of Guatemala. However, supplies remain light with fair quality of conventional out of Mexico.

Zucchini/Yellow Squash: Lighter supply available out of Florida, McAllen and Nogales and quality is good.

Herbs

Fresh herbs remain steady, with the supply of basil starting to come back just in time for the Holidays. Growers have good supplies on almost all the herbs, but demand is picking up. CHERVIL is the only herb that is short in supply due to yellowing, and growers are actively working with their teams to improve this.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Marginal	USA
Basil	Steady	Steady	MEXICO
Opal Basil	Steady	Steady	USA/MEXICO
Thai Basil	Steady	Steady	MEXICO
Bay Leaves	Steady	Steady	COLOMBIA
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEXICO
Cilantro	Steady	Steady	USA
Dill	Steady	Steady	USA
Epazote	Steady	Steady	MEXICO
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	MEXICO
Mint	Steady	Steady	USA
Oregano	Steady	Steady	MEXICO
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	MEXICO
Sage	Steady	Steady	MEXICO
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEXICO
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

Growers are forecasting lower melon volume the rest of this month. October rains, combined with cooler November temperatures in Guatemala, caused poor pollination and low fruit sets which have negatively impacted yields. Production in the Zacapa valley will continue through the end of December, so we do not anticipate relief from the current situation until we move on to our farms in other regions for the middle cycle.

Cantaloupe: Offshore Cantaloupe production is yielding larger fruit, heavy to 9's shell cast color is a bit greener then expected but brix levels are good, reports are ranging 14-17%. Markets will be firm through December.

Honeydew: Offshore honeydew supplies are limited lighter, and sizing is heavy to 5's External quality has been good except for a few scars and Internal quality is providing brix levels in the 10-13% range. We are seeing Mexican product decline and should wrap up over the next ten days.

Watermelon: Overall quality is good out of Mexico.

Mixed Vegetables

Artichokes: WATCHLIST Overall industry supplies continue to be very light with strong demand. and most shippers are only able to cover averages until supplies increase. We anticipate supplies to start increasing although holiday demand will keep available supplies.

Arugula: Supplies are good with good quality

Asparagus: ESCALATED Asparagus production in southern Baja and Caborca has fallen off this week due to seasonality and cooler temperatures. Production of Large and Jumbo is extremely limited. Peru's production remains unchanged on standard and large. Jumbo is also limited from Peru. Markets remain sluggish, but we should see better demand at the end of next week with the Christmas rush starting.

Bok Choy: Good supplies with good quality.

Broccoli/Broccoli Crowns: Steady supplies with very good quality and market is steady with slightly better demand.

Brocolini: ESCALATED Expect to see a large supply gap of Brocolini as growing regions transition. This gap is expected to last at least through week until we see supplies from Mexico improve. This supply shortage is caused by two things; lower than expected production as the Salinas growing region finishes for the season and the transition to the Mexico growing region, we are expecting low yields due to weather. Prorates and limited supplies are expected.

Brussels Sprouts: Demand has decreased after Thanksgiving; quality is very good with good supplies. Expect demand to increase as we get closer to the Christmas pull.

Carrots: (JUMBOS, MEDIUMS and CELLOS) 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: Quality looks good but expect to see supply drop over the next couple weeks. Mild temps in the Yuma area are slowing growth.

Celery: Good supplies with very good quality, but expect demand to increase heading into Christmas.

Cilantro: Cilantro supplies, and quality continue to improve.

Corn: Improving supply available out of Florida while in the west the season is done out of the desert transitioning to Nogales. Markets will be higher this week. Quality is good.

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

Garlic: The 2023-2024 California Garlic is in full swing. Quality is 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 through December.

Napa Cabbage: Supplies are good with good quality.

Parsley (Curly, Italian): Supplies and quality are good, market is steady.

Rapini: Good supplies with very good quality in both Salinas and Yuma.

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 Guatemalan quality and production of both peas continue to improve. Domestic production is gapping, while Mexico has started with limited quantities. Expect this trend to continue for the next few weeks.

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.

Tomato Update:

When can we expect to see some relief?

- Could be as late as Mid-January due to the rain events in Mexico causing damage and delays.
- We do not anticipate the need to sub over to rounds or vice-versa; we expect volume in general to be snug but if we are staying ahead of the inventory, we hope to avoid that practice.
- Please review your alternate specifications should subs be necessary over the coming weeks.

Tomatoes: East Coast

- **Round Tomatoes: WATCHLIST** Markets are mixed as production ramps up in Immokalee for the winter months. We are seeing shorter availability on larger fruit, and we expect some volatility in the markets through end of year.
- **Roma Tomatoes: EXTREME** Markets are very short and seeing extremely high prices. We do expect to see some possible shorts and pro-rates over the next 12-14 days and volatility in the markets through end of year.
- **Grape and Cherry Tomatoes: ESCALATED** Grape tomato supply will be short this week, FOB prices will continue to be escalated this week. We may see lighter markets for the next two to three weeks and could see some pro-rates. We anticipate some relief over the next 12 days.

Tomatoes: Mexico

- **Round: WATCHLIST** Markets were higher this week as demand shifted due to the lighter availability of roma tomato from all growing regions. We are seeing higher prices, particularly on larger fruit across the entire category. In general, we expect markets to be up and down over the next 4 weeks until we settle in Culiacan.
- **Roma Tomatoes: EXTREME** The Mexican roma market may see potential shorts and volatility is expected. We feel the next 10-14 days will be a challenge on the supply side as volume decreases daily on old crop supply out of Central Mexico and Baja. We have seen markets spike drastically this week and expect them to continue to rise. More importantly, growers are unable to fill orders and it is becoming more difficult to source fruit when needed. Our grower partners are doing the best they can to harvest fruit to maintain service levels, but there is simply not enough yield at this time. We expect to see industry wide supply GAPS over the next ten days on good quality fruit and ask for flexibility on load dates and sizes as we face possible pro-rates while we work through this interruption.
- **Grape and Cherry Tomatoes: ESCALATED** Record Low 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 3-4 weeks.
- **Medley Grape Tomatoes:** Lighter volume this week with fair quality.
- **Tomato on the Vine:** Lighter supply this week and quality is good.

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.