



























## OXNARD, CA

Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17	Thu 7/18
70°   59°F	70°   60°F	73°   60°F	70°   59°F	69°   59°F	69°   58°F	69°   59°F	71°   60°F
							
AM Clouds/PM	AM Clouds/PM	Partly Cloudy	AM Fog/PM	AM Fog/PM	Partly Cloudy	Partly Cloudy	Partly Cloudy









## BAKERSFIELD, CA

Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17	Thu 7/18
113°   83°F	111°   83°F	109°   80°F	107°   78°F	105°   74°F	104°   72°F	101°   74°F	103°   75°F
							
Sunny	Partly Cloudy	Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









## JALISCO, NAYARIT

Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17	Thu 7/18
78°   66°F	78°   66°F	80°   67°F	82°   67°F	83°   67°F	82°   67°F	82°   66°F	82°   66°F
							
PM Thunderstorms	Thunderstorms	Thunderstorms	Isolated Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms

## VIZCAINO, BAJA SUR

Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17	Thu 7/18
105°   70°F	105°   69°F	101°   70°F	100°   70°F	102°   69°F	100°   68°F	99°   69°F	101°   72°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny

## HENDERSONVILLE, NC

Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17	Thu 7/18
86°   64°F	87°   67°F	88°   68°F	90°   67°F	91°   68°F	92°   70°F	89°   69°F	85°   67°F
							
Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Scattered Thunderstorms	Scattered Thunderstorms

## Fruits & Vegetables

**Avocados: ESCALATED** Harvest levels of 60M pounds for the past 2 weeks have restocked the pipeline, and the inventory concerns of the stoppage are officially behind us. Last week, Mexico reclaimed some of its market share and increased to 46%, up from its low 24% market share 2 weeks ago. Harvest in Mexico remains strongest on Old Crop/Negra fruit as Loca needs some sun for dry matter to increase to ensure it makes minimum requirements for importing to the US. Last week's arrivals came in at 11.25M pounds, and the US expects almost 15M pounds to arrive this week. The size curve coming out of the mid-season harvest is slowly sizing up, but significant changes aren't expected for this year. The next 4 weeks of Peruvian arrivals will be the peak of the season, followed by an earlier ending to the season than the previous several years, with most programs ending in August. Last week closed at 16 Mil lbs. With the market softening, it's a good time for growers to slow down. The last month of harvest from California is the strongest in recent history – coming in at 73.6M pounds over a 4-week period. Estimates for what remains on the trees in California continue to grow, and the season will now easily last through August.

**Bananas:** Steady supply and quality remain good across the country except for Texas which could be delayed due to Hurricane Beryl. We suspect it will improve over the next 7- 10 days.

**Pineapples:** Steady was lighter this week and quality remains good. Sizing is going to be a challenge over the next few weeks and flexibility on sizing may be necessary (5-6 ct fruit is very short, & 7-8's plentiful). We expect to see the sizing even out by the middle of July. Supply in the Texas market could be delayed due to Hurricane Beryl, but we suspect it will improve over the next 7-10 days.

**Table Grapes: WATCHLIST** Supply will be tight this week as Mexican grape season ends and the transition to California is underway. Quality out of California is mostly good, the crops are taking the heat wave better than expected.

### **Berries**

**Strawberries:** Supplies remain steady and are expected to remain steady for the next several weeks. This week has been slightly cooler with daytime temps in the low 70's and nighttime temps in the mid 50's. Production has been confirmed to have just passed its peak, and we expect slightly decreased but steady production for the following weeks. Growers are seeing increased instances of darker, overripe fruit due to higher temperatures as the summer progresses. Both methods have good sheen, medium size, strong red color, and good flavor, but all growers see misshapen fruit, bruising, mildew, and overripe fruit. Santa Maria temperatures are also slightly cooler, with daytime temps in the low 70's and nights in the mid-50s. Due to the high heat last week, growers are seeing fruit ripen quickly, resulting in smaller sizing and softer skin (more easily bruised). Spring Crop production in Santa Maria is steadily winding down until Fall Crop starts. Growers are seeing bruising issues, soft skin, mildew, and overripe fruit in the fields. Expecting more drops in overall production volume due to high heat, season winding down, and rejections ensuring high-quality packs. No labor issues have been reported

**Blackberries:** Quality is good, with sizing between the medium to large range, a nice sheen, mostly black, and good firmness. Due to high temps in the regions, growers do see some regression in some ranches and some soft, leaking fruit as the days continue to be hot. Volume for blackberries is in a peak from Mexico. Watsonville production is looking good. Production will begin doubling about every week until the peak in September. Quality has been strong with nice black sheen, but growers are seeing some calyx attached and maybe a leaker here and there.

**Raspberries:** Weather has been hot and seeing temps in the low 80's and nights at the low 60's. Production for bushberries is back up to a sustainable peak, and between Mexico and California, there should be plenty of supply. Overall, fruit is looking good with a strong red color, with some fruit with lighter in color in the pack due to picking a bit early ahead of the heat. Growers do see some overripe and crumbled fruit sporadically throughout the packs, but crews are doing their best to keep them out of the packs. Volume for raspberries is in a peak from Mexico. Watsonville production has been steadily increasing and is looking great. Production will begin doubling about every week until the peak in late July to early August. Quality has been good with good color and flavor, but growers are seeing some overripe fruit.

**Blueberries:** Growers are seeing some issues of shriveling, scarring, and deformities. Overall, the blueberries' color, size, and flavor are good. Production is trending down due to the high heat. Conventional-wise, volume is expected to dip in late June through July and start ramping up towards September. Organic-wise, volume has begun tapering off and will have low amounts of small, steady volume over the next few months. Production has wrapped up for the season out of Central Valley. Oregon started off strong this last week with excellent fruit and meeting estimates. Organics have been slightly delayed and will begin packing this week. Oregon is expected to hit a large volume towards the middle of July. Washington organics has also started production. Fruit is looking great as well. Washington is expected to hit a large volume towards the middle of August. Conventional fruit will begin sometime next week.

### **Citrus**

**Oranges: WATCHLIST** The Valencia season is underway with good quality. There are currently small size oranges available but as the summer progresses fruit will be sizing up and small oranges will become scarce again. In addition, many shippers are predicting a gap between the end of the Valencia season and the beginning of the Navel season this fall.

**Lemons: EXTREME ON SMALL SIZES** We continue to see small Lemons in California exceptionally short with no relief in sight until District 3 fruit gets started late in the summer. Import Lemons are arriving with small fruit available. Supply on lemons from Mexico continue to be very light as drought conditions have affected available fruit to pick. Flexibility on sizing and loading areas will be mandatory to get orders filled on orders loading in California!

**Limes: ESCALATED** The market is steady, but with the rain we have had over the last several weeks, we should start to see a slow increase in availability on large sizes, with volume on small sizes beginning to decrease towards the end of the month. Fruit quality/condition will not improve until growers get into the new growing areas in the late summer/early fall.

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

**Imports/Specialties:** Domestic mandarins are finishing but imports are starting to arrive. Import Lemons and Oranges are available.

### **West Coast Lettuce**

**Iceberg: ESCALATED** While there is adequate supply, the market has already fluctuated. We are watching for internal burn and thin texture in the cap leaves. Iceberg VA items are still escalated this week and will be on the radar for the month of July due to the heat.

**Romaine, & Romaine Hearts: WATCHLIST** Romaine and romaine heart supply is good, but there is some internal "sat n peppering" in the hearts. Product is slightly dehydrated from the high heat, and you may see some light fringe burn on carton romaine. This item will be on the watchlist for all of July and may potentially escalate if the heat starts to impact supply and quality.

**Green Leaf and Red Leaf: WATCHLIST** Production in the Salinas Valley is steady and overall quality is very good with good movement. These items were added to the watchlist due to the concerns of the heat wave.

**Butter: WATCHLIST** Production in Salinas Valley is steady. Overall, the quality is good.

### **Eastern and Western Vegetables**

**Green Bell Pepper: ESCALATED** Lighter supply in the east and west have spiked the market, so expect conditions to be the same for the next week. Transition in both regions, combined with weather related supply and quality issues, have impacted supply until we can get into newer blocks. In the east, Georgia is done and we will move to North Carolina and Tennessee, while in the west the desert is done. Markets will be in the upper 20's on all sizes with possible pro-rates expected. We will need to keep a close eye on the west as the heat wave will impact the early crop out of Bakersfield and Arvin.

**Color Bell Pepper: ESCALATED** Very light supply and fair quality will impact the market for the next ten days mostly due to the west coast. We expect to see challenges over the next two weeks, and we are seeing some poor quality, soft pepper and sun scald. There are some hot house peppers available from Mexico and Canada.

**Mini Sweet Pepper: Supply** will be hit and miss this week loading in California.

**Mixed Chili Pepper: ESCALATED** Record low supply continues! In the east we are seeing a GAP on a few hot pepper items, poblano and cubanella are the shortest due to heat and rain related pressure; with the transition to Tennessee and North Carolina expected over the next two weeks we expect supply locally to be extremely short. There are some local deals starting to scratch and Southern Valley is doing what they can to secure any additional product they can. Mainland Mexico we are starting to transition from Guanajuato to Chihuahua but are also seeing delays; the new regions are receiving quite a bit of rain and may get hit by this latest hurricane in the Caribbean Sea. Currently...they are seeing very tight markets on the following items: Habanero, Shishito, Anaheim, Serrano, Poblano while tomatillo and jalapeno supplies are fair. In the west the summer production is not quite ready in Baja nor California; we do not expect to see improvements for the next two weeks in the west as well.

**Eggplant:** Good supply and quality available this week out of the Central Valley and Southeast. We will need to watch the west as they are about to be hit by a heat wave that could damage unprotected crops.

**Slicer Cucumbers:** Lighter supply this week crossing in Otay and McAllen. Locally, South Georgia is done and we are moving north this coming week. Overall, the quality is good.

**English Cucumbers:** Supply tightened up this week and markets ticked up a few dollars. Quality is good.

**Pickles:** Supply and quality are good this week.

**Green Beans: ESCALATED** Supply is lighter this week and quality hit and miss due to weather related pressure. We should see better supply in 1 week as we transition to newer growing regions

**French Beans: EXTREME** Production is extremely low due to the heat and lack of rain for the past several weeks coupled with the recent heavy rain. Supply will continue to be historically low for the next few weeks. Fair supply and good quality of French beans out of Mexico.

**Zucchini/Yellow Squash:** Excellent supply out of California and other local regions; Georgia is mostly done for the summer. We will need to watch the west coast as they are experiencing a heat wave that could impact supply over the next several days, and overall quality is good.

### **Herbs**

Good supply and quality on all herbs. Chervil production is normal.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Marginal	USA
Basil	Steady	Steady	USA/MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL

Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

### **Melons**

**Cantaloupe:** Excessive temperatures over the past week in the Westside District have accelerated the maturity on melons pushing higher than expected daily pack outs. These high temperatures (109-113F) will continue through the balance of the week which is limiting the amount of time harvest crews can be in the fields. The heat has pushed cantaloupe sizing up to mostly 9/9Js currently being harvested with a limited number of 12s. Fruit being packed has excellent sizing and full straw color with strong brix levels in the 14-17% range. Peak volume will continue throughout the month of July, but flexibility of sizing may be necessary.

**Honeydew:** Honeydew production is backing off some the next few days as extra crews are being placed into the cantaloupe fields which are more susceptible to the heat. Sizing on the dews has mirrored the cantaloupe with mostly 5/5Js and we have been packing 6Js to ensure coverage on all contractual commitments. Quality on the honeydews is checking all the boxes with clean fruit being packed and internally brix numbers are hitting 15+% with an excellent flavor profile, but flexibility of sizing may be necessary.

**Golden Honeydew:** Supply available out of California.

**Watermelon:** Good supply available as new crop is being harvested out of North/South Carolina, California, Missouri as well as Mexico.

### **Mixed Vegetables**

**Artichokes: ESCALATED** Overall supplies are still light. Quality is good.

**Arugula:** Supplies are good, and quality is fair, but we are watching for more yellowing

**Asparagus: ESCALATED** Obregon/Southern Baja production continues to be slow due to heat in the fields. Production in Guanajuato has improved due to recent rains. Peruvian volume is still down due to cooler temperatures in the northern growing region of Trujillo. We should see improved supply in the next two to three weeks. White asparagus continues to be out until the end of July. Markets are still extremely active with the lack of production. Large sizes will also be difficult to come by for the next few weeks. Warm weather in both Mexico and Peru is causing smaller sizing

**Bok Choy: ESCALATED** Supplies are fair, and quality is good, but there are some issues with dirt in the core. The market is active.

**Broccoli/Broccoli Crowns: ESCALATED** Overall quality is fair, and supplies are light due to the hot weather. We can continue to expect increased pricing and short supplies for at least the next few weeks. We have seen brown and yellow bead, purpling and deformation.

**Broccolini and Sweet Baby Broccoli:** Salinas is showing good quality, but supplies are limited. The heat is taking its toll on this product.

**Brussels Sprouts: ESCALATED** Demand continues to outpace available supply. Supplies in the VA category may see some shortages driven by quality issues and whole brussels sprouts will continue to see prorates. Insect damage is still a chronic problem, discolored leaves, smaller sizing and elongated stem are all issues that have been reported.

**Carrots: (JUMBOS, MEDIUMS and CELLOS): WATCHLIST** Steady supplies continue with good Quality. Shippers still have light volume out of California, but volume is improving.

**Cauliflower: WATCHLIST** Industry supplies are great, and quality and color are very good, but the heat wave could cause yellow bead, discoloration, pin rot and breakdown so this item is being added to the watchlist.

**Celery:** All production is now in Salinas. The quality is very good, and supplies are steady.

**Cilantro: ESCALATED** The market is active and supplies remain tight due to field challenges such as burn, mildew and spotting.

**Corn:** Good supply available out of South Georgia and the Central Valley and quality is outstanding. Markets have ticked up since the holiday and will need to watch corn out of the west closely as the heat will certainly affect the crop.

**Fennel: ESCALATED** The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve.

**Garlic:** The 2024 California Garlic Crop will be getting started approximately the first week of August. Look for subs to Mexican product during transition. Quality is good.

**Ginger:** Supplies and market are steady

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

**Green Onions: WATCHLIST** Due to the extreme heat and humidity, we are seeing reduced yields from harvesting and will likely see the market gradually escalate over the next few weeks.

**Mushrooms:** Stable supply and good Quality available.

**Napa Cabbage: ESCALATED** We continue to see some quality issues, but we should see an improvement over the next few weeks. Quality and supplies are improving.

**Parsley: ESCALATED (Curly, Italian):** Supplies are improving quality is fair.

**Rapini:** Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light into July.

**Red Cabbage: ESCALATED** Pricing is escalated, and quality is good although supplies continue to be tight. Market remains very active

**Spinach: WATCHLIST** Supplies are still good with very good quality. The hot weather makes it grow faster but we are watching for yellowing and mechanical damage.

**Spring Mix:** Supplies are good with very good quality.

**Snow Peas and Sugar Snaps: ESCALATED** Guatemala production of snow peas and sugar snaps is almost non-existent due to weather issues the past 3-5 weeks. Peruvian snow peas are available in Miami. Markets are very active on all peas. Out of the west, snow and sugar snap pea supply is improving.

### **Onions: ESCALATED**

The onion market is weakening fast on yellows. Between the influx of supply in New Mexico and Central California, as well as the constant crossing of Mexican onions, there is a situation where supply is exceeding demand on yellow onions. We anticipate this situation will stay sloppy on the supply side until the beginning/middle of July. At that point, a lot of the Mexican product, and the remnants of previous deals (Brawley, Washington) will be cleaned up which should help to shore up the surplus of supply. Reds have remained elevated, and while there are volume deals taking place in California due to extreme heat, and to move yellows, they appear they will stay strong until the Northwest. Whites had gotten very cheap over the last several weeks, and we are starting to see a lot of those get cleaned up. We should see those rebound and potentially tighten up in the coming weeks as well. There are reports that the

Northwest planted more acreage than last year, and pending weather conditions, may have a large crop that will start as early as late July. If that should happen, the market will have a hard time crawling out of wherever the price points are when the Northwest enters. Trucks continue to remain plentiful, and we have not seen any type of rate spike this week.

### **Potatoes:**

The market continues to feel stable on all sizes and grades for the moment. We continue to see 40ct/50ct and now even 60ct remaining tight. They are available in mixer quantities, but heavy volumes do not seem to be available now. Smaller size potatoes continue to remain plentiful and challenging to move. There is not much further for the market to fall here, as growers are at the point where it would not make any financial sense to pack them at all at lower pricing levels. While relief was widely expected for this coming year, nobody thought the FOBs would be quite as low as they currently are. At this point, there does not seem to be a scenario where the market turns around any time before the Summer. Even then, supply will have to dwindle enough in June/July to allow FOBs to firm up, and quality will need to be strong enough to hold as well. The positive news is that quality is strong throughout the state, and there should be no shortage of available product in all sizes and grades. In fact, there will likely be an overlap of this year's current crop into next year so next year could unfortunately be a tough year on grower returns as well. Trucks seem to remain plentiful now.

### **Tomatoes: East Coast – ESCALATED**

- **Round Tomatoes:** Markets have firmed up due to transition from Florida and South Georgia to the local regions in the Carolinas, Tennessee, Arkansas and Virginia. Deals are being made on larger sized fruit this week, but we expect that distribution to even out over the next 10 days. Overall quality is very nice.
- **Roma Tomatoes:** Markets are higher this week due to limited supply out of Tennessee, Virginia, Alabama and North Carolina. Between the high demand, growers planting less, combined with delays in production we are seeing the market is pushing the mid 20's. We expect to remain this way through the middle of next week at the earliest.
- **Grape Tomatoes:** Light supply expected for 2-3 weeks due to transition
- **Cherry Tomatoes:** Light supply expected for 2-3 weeks due to transition

### **Tomatoes: Mexico - ESCALATED**

- **Round and Roma Tomatoes:** Good supply and quality available out of Jalisco and Baja, but rain this week could impact Southern Mexico causing delays in harvesting. We will need to watch the outcome of the tropical weather impacting Central and Southern Mexico this weekend. Expect to see higher demand and upward pressure on price as demand will increase from the east as the local transition is underway. This will continue to put upward pressure on FOB prices
- **Grape Tomatoes:** Lighter supply available as Sinaloa is done for the season and Baja is slow to start. We will also see higher demand from the east as the local transition is underway. Expect firmer markets through July 4<sup>th</sup>.
- **Cherry Tomatoes:** Steady supply and good quality available crossing through McAllen and Nogales.
- **Medley Grape Tomatoes:** Good supply available this week quality is good.
- **Tomato on the Vine:** Steady volume available this week.

### **California Tomatoes - WATCHLIST**

- Mature greens out of the desert are done and have transitioned to the Central Valley this week. We could see some weather-related pressure on the crop as heat is expected to impact the region for the next several days with highs over 100 degrees.

### **APPLES**

**Apples:** Washington State Apple Crop continues to produce good supplies and good quality products. The Core Varieties, Reds, Golds, Galas, Fujis, Gr Smiths, and Honeys, will make it to a new crop. Galas are down 600,000 boxes from last year, but the state still shows availability that will likely last for the new crop.

**Pears:** The crop appears to be 5 weeks from being finished for the Season. The Bosc Crop is finished for the Season, and Red Anjous should be done in the next 4 weeks. Northwest Bartlett Crop should start around August 8th, leaving us about a 2-week gap between old Anjous and New Crop Barts. The Wenatchee Valley Pear crop was devastated due to freezing temps in February. The Yakima Valley and Hood River Growing Regions were hurt but not nearly as badly as Wenatchee. Bottom line – Pear crop will be extremely tight the entire '24/'25 season.

### **Other Fruit**

- California stone fruit now in production and cherries are done with good availability now out of the PNW.
- Apricots now available
- California table grapes will scratch this week.
- Georgia Peaches are in excellent supply.