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Thu 7/25	Fri 7/26	Sat 7/27	Sun 7/28	Mon 7/29	Tue 7/30	Wed 7/31	Thu 8/1
109°   80°F	106°   71°F	97°   68°F	96°   69°F	97°   70°F	98°   71°F	99°   72°F	101°   75°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

## JALISCO, NAYARIT

Thu 7/25	Fri 7/26	Sat 7/27	Sun 7/28	Mon 7/29	Tue 7/30	Wed 7/31	Thu 8/1
75°   66°F	78°   65°F	81°   65°F	82°   67°F	83°   67°F	82°   67°F	79°   66°F	81°   66°F
							
Thunderstorms	Thunderstorms	Scattered Thunderstorms	Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms

## HENDERSONVILLE, NC

Thu 7/25	Fri 7/26	Sat 7/27	Sun 7/28	Mon 7/29	Tue 7/30	Wed 7/31	Thu 8/1
76°   66°F	79°   66°F	79°   65°F	81°   67°F	78°   65°F	83°   66°F	86°   67°F	87°   67°F
							
Rain	Showers	Cloudy	Showers	Thunderstorms	Thunderstorms	PM Thunderstorms	Scattered Thunderstorms

## Fruits & Vegetables

**Avocados: ESCALATED** Last week saw a 6% decrease in overall volumes, with the US recording 56.4M pounds. Mexico's harvest has been affected by rain, leading to reduced inventories and a strengthening market. Old Crop/Negra remains abundant, while Loca is less prominent. Peru brought in 14M pounds last week, with similar volumes expected for the next 2 weeks. The mid-season harvest is slowly increasing in size, but significant changes are not anticipated this year. The season is projected to end earlier than in previous years, with California expected to produce over 300M pounds, a significant increase from earlier projections. Volumes will be available through August, with the season wrapping up in September.

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

**Pineapples:** Lighter supply this week and quality remains good. Sizing is going to be a challenge over the next few weeks and may need to be flexible on sizing as 5-6 ct fruit is very short with 7-8's plentiful. We expect to see the sizing distribution even out by the end of July.

**Table Grapes:** Excellent supply will be available out of California this week and quality out of California is good as crops are taking the heat wave better than expected.

## Berries

**Strawberries:** For the next five days, the Salinas/Watsonville weather will have daytime highs in the low 70s and evening lows in the mid-50s. Quality is suitable for this time of year, though typical defects such as dark fruit, small sizing, and some crooked and soft fruit are present. We are approaching the end of our first harvest. Harvest will decline over the next few weeks until the new flower set is ready by mid-August. The Santa Maria weather is in the mid-70s to low 80s during the day and in the mid to high 50s at night. We are encountering overripe, sunburnt, soft-skinned, and dark-colored fruit. Today is the last day for conventional fresh harvest. Organics are experiencing similar defects as conventional. Growers are dropping a lot of organic fruit to meet grade. The organic crop harvest will plateau for the next two weeks. Conventional fall crop harvest is projected to start in mid-August.

**Blackberries:** The high humidity in Mexico is causing the fruit to feel soft, and growers are contending with SWD pressure. Rejections are increasing at the cooler level. Out of Watsonville, blackberries are approaching their peak in the next couple of weeks, and their quality should continue to improve. Currently, the fruit is medium to large, with some smaller, tart berries mixed in. The occurrence of attached calyx remains minor.

**Raspberries:** The weather in Mexico has been mostly overcast with rain, with highs in the low 80s and lows in the low 60s. The high humidity has led to mold on arrival. Growers are doing their best to send good fruit. Overall, raspberries that meet specifications after arrival have a nice red blush color but show signs of humidity by becoming soft. Overall, the raspberries out of Watsonville have a nice

dark red color due to the warm temperatures under the hoops, and their size is generally medium. We expect a steady decrease in volume from the end of July through October before it picks up again.

**Blueberries:** Temperatures were in the low to mid 100's. Growers are wrapping up duke harvest this week. Growers are being diligent on quality, diverting fruit as needed if the fruit does not make grade. Quality is good. This week, growers have started harvesting mid-season varieties like draper, blue ribbon, legacy, and brigitta. Quality on the mid-season varieties is starting off well. Eastern Washington has seen prolonged extreme heat that will continue through Wednesday of next week. Temps have been in the mid to high 100's, sending large volumes to the process market. Our team is assessing the total damage, and the organic volume will be very light over the next few weeks. British Columbia growers have started machine harvesting duke this week, and packing houses are working through large volumes. The conventional peak is set for weeks 30-35. Quality has been good out of BC to start the season. BC did not receive the same heat wave as the Willamette Valley and central Washington. High temps in BC remained in the upper 70s and low 80s during that time, while high temps were above 100F in the Willamette Valley and Central Washington during that same time. Byos have started pruning out of Mexico but will continue to deliver light volume into week 29. Volume will be dependent on quality for the remainder of the season. Most growers are pruning at this stage in the season. The quality is mostly good.

### Citrus

**Oranges: WATCHLIST** Quality is good, and the market is steady. Some shippers are starting to see a slight decrease in available supplies. 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. Supplies 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 IN ORDER TO GET ORDERS FILLED ON ORDERS LOADING IN CALIFORNIA!**

**Limes:** The market is steady. Volume on large sizes continues to improve with light demand. Fruit quality/condition is fair from the drought conditions in the growing areas over the summer, but we are seeing some improvement.

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

**Imports/Specialties:** Import Lemons and Oranges and Mandarins are available.

### West Coast Lettuce

**Iceberg:** Supply and quality are good. We have seen a bit of sun damage on the cap leaves but once that is removed, the quality is good. This item is no longer escalated, but we could potentially escalate again if the heat causes any quality issues.

**Iceberg VA:** Iceberg VA items are no longer escalated. Quality and supplies look good.

**Romaine, & Romaine Hearts: WATCHLIST** -Romaine, and Romaine Heart supplies are good but there is some internal "salt n peppering" in the hearts. Product is slightly dehydrated from the high heat, and you may see some light fringes burn on the Carton Romaine. You may also see some darker color in the chopped and Romine blends but that is just from harvesting the younger fields. This item will be on the watchlist for all of July and may potentially be escalated if the heat starts to affect the supplies and quality.

**Green Leaf and Red Leaf –WATCHLIST:** Production in the Salinas Valley is steady. 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 has spiked the market and expect conditions to be the same for the next week. Transition in both regions combined with weather related supply as well as quality issues have impacted supply until we can get into newer blocks. In the west green supplies are slowly improving, however 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: EXTREME** Very light supply and fair quality will impact the market for the next ten days, mostly due to the heat on the west coast. We are seeing poor quality, soft pepper, and sun scald, at this time so please expect to see challenges over the next two weeks. In the east, with the transition color pepper is almost nonexistent which we hope to see improving supply over the next two weeks. 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 cubanelle 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: Steady** supply this week crossing in Otay and McAllen. Domestically some of the local regions are scratching such as Tennessee and Michigan. Overall, the quality is good.

**English Cucumbers:** Stable supply and good quality will be available this week.

**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.

**French Beans: Escalated** Production continues to improve, particularly on bulk packs. Smaller packs are still limited but improving.

**Zucchini/Yellow Squash:** Excellent supply out of California as well as several local regions. Quality is good.

### Herbs

Good supply and quality on all herbs, except for dill and tarragon, which is being affected by weather in Mexico, Peru and Colombia. 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
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## **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. The heat has pushed cantaloupe sizing up to mostly 9/9Js currently being harvested with a limited number of 12s. Fruit being packed not only has excellent sizing but has full straw color with strong brix levels in the 14-17% range. Peak volume will continue throughout the month of July. 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. We have been packing 6Js to ensure coverage on all contractual commitments. As you can see in our LinkedIn post below the 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. 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 has dropped on the bigger sizes due to heat in the crowns. Mexico has an overproduction of small and standard sizes. Production in Guanajuato continues to improve, but only on the smaller sizes. Rain is expected in this region this weekend. Peruvian volume continues to improve, but cooler temperatures are slowing down growth of the bigger sizes. Southern Peru should start in three to four weeks. White asparagus continues to be out until end of August and will still be limited until November. Markets are less active on smalls and standards, more active on large, XL and jumbo.

**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:** Quality and supplies have improved, but we will continue to keep an eye on it with the heat still an issues.

**Broccolini and Sweet Baby Broccoli:** Quality is good, but supplies are limited in some areas. Things are improving though.

**Brussels Sprouts: ESCALATED** The outlook for supplies continues to be light. Expect to see an escalated market with limited supplies on the bulk items. Quality is good and insect injury has educed but the elongated seed stem/core is still present.

**Carrots: (JUMBOS, MEDIUMS and CELLOS):** Steady supplies continue with good quality.

**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. This item is on the watchlist as a precaution from the heat, but supplies remain plentiful currently.

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

**Cilantro:** The market is active, and supplies are looking good. The price is no longer escalated and supplies plentiful.

**Corn: ESCALATED** Supply is hit and miss in the east due to transitional gaps and poor quality is prevalent due to insect pressure. In the west, supply is stable and markets remain firm this week.

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

**Garlic:** Slight delays in the new crop California garlic getting started as growers have experienced some growing challenges. Quality remains good with very good demand.

**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, but things do seem to be improving.

**Spinach: WATCHLIST** Supplies are still good with very good quality. The hot weather makes it grow faster so we are seeing some thinner texture, and we are also 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 still almost non-existent due to weather issues the past 3-5 weeks. Peruvian peas are available in Miami. Markets have come off with more Peruvian peas available.

#### **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**

- **Round Tomatoes: ESCALATED-** No major changes in the markets despite the local deals now being in full swing with strong demand and firm markets. Now picking in North Carolina, 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: EXTREME** Markets remain firm as supply has not hit a good stride yet locally. We expect to remain this way through the middle of next week at the earliest.
- **Grape Tomatoes: ESCALATED** Improving supply locally has put downward pressure on the category. We expect this to continue as more volume locally becomes available.
- **Cherry Tomatoes:** Supply is stable with moderate demand. Quality is good.

#### **Tomatoes: Mexico**

- **Round Tomatoes: ESCALATED-** 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 price
- **Roma Tomatoes:** Limited supply continues out of Jalisco as rain continues to impact Southern Mexico causing delays in harvesting. Baja has transitioned from Vizcaino to San Quintin and should see more volume over the next 7-10 days. Central

Mexico volume remains light crossing through McAllen due to rain related quality pressure. We expect to see good demand with some improvement to supply this week however FOB prices will remain higher than expected.

- **Grape Tomatoes: ESCALTED** Supply slowly improving out of Central Mexico and Baja. Markets remain firm due to strong demand from the east. This should stabilize as the east coast production starts to ramp up.
- **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 are hit and miss out of the Central Valley. Weather related pressure (Extreme Heat) has caused a lot of quality issues on product being pulled out of the region. We expect to see higher cull rates and compromised quality for the next 2-3 weeks on rounds and romas.

#### **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.