

# Weekly Market Review

## September 13, 2024

### Overview

Supplies are lighter this week on local corn, bell peppers, hot peppers, squash and cucumbers. East coast berries and stone fruit are wrapping up while beans continue to be stable. Fall items such as sweet potatoes and pumpkins are expected to be available this week. We are watching for impacts of Tropical Storm Francine and will assess once the storm leaves the region. Tomato markets are still volatile with rounds lighter this week and plenty of romas available. Current table grape supply and demand out of California is strong. Pineapples continue to be short, and shippers are asking to be flexible on sizing to navigate the shortfalls. In the west, tighter supply available to market on mushrooms; weather impacts and viral pressure have caused supply shortfalls across the region on all varieties and they are hoping this will improve over the next six weeks. Lime volume continues to decline with marginal quality until the new growing areas get started sometime at the beginning of Q4. Loca fruit out of both Michoacán and Jalisco are sizing up, and 48s are becoming a larger portion of the size curve. This trend is expected to continue as Q4 is historically heavier on 48s & larger. October is looking more favorable as there will be plenty of overlap between Flora Loca and Aventajada crops to supply the US with Mexican avocados during the fall & beyond. The substantial rise in fuel prices in Colombia has led to nationwide strikes by truckers, widespread road blockades, and participation from other transportation sectors, significantly disrupting logistical operations for agricultural producers. Weather in the Salinas Valley is cooling down. The Brussels sprouts market is no longer escalated and supplies are finally looking good across the board. Endive, escarole, leeks, cilantro and fennel are still escalated but are trending down. Supplies are improving and the cooler weather should really help as long as it sticks around. Green onions and artichokes are still at the extreme trigger. They are extremely tight. Expect these to stay escalated throughout the month. You can expect to see growers holding to averages on these items. Cauliflower is no longer escalated and supplies look good. Broccoli is still escalated but is trending down and should be off triggered pricing soon. Spinach is still not escalated, but it is on the watchlist due to tight supplies. Some growers are prorating. Excessive heat in the San Joaquin Valley citrus growing areas, have heavily effected supplies on the Valencia Orange crop with another heatwave forecast for the end of this week. Most shippers are reporting probabal "Gaps" in production of up to 2 to 3 weeks or more between the end of the Valencia Crop and the beginning of the Navel season.

### Alert









- Asparagus – **ESCALATED**
- Artichokes – **EXTREME ON SOME SIZES**
- Avocados – **ESCALATED**
- Bell Pepper (Red, Yellow, Orange) – **ESCALTED**
- Blueberries – **EXTREME**
- Bok Choy – **ESCALATED**
- Broccoli Florets and Crowns – **ESCALATED**
- Carrots – **ESCALATED**
- Cabbage, Red – **ESCALATED**
- Cilantro – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Green Onions – **EXTREME**
- Hot Peppers (Red Fresno and Serrano) – **ESCALATED**
- Leeks – **ESCALATED**
- Limes – **EXTREME**
- Mushrooms – **ESCALATED**
- Napa – **ESCALATED**
- Lemons – **EXTREME ON SMALL SIZES**
- Parsley (Curly & Italian) – **ESCALATED**
- Pineapple – **ESCALATED**
- Slicer Cucumber – **ESCALATED**
- Strawberries – **ESCALATED**
- Tomatoes (Rounds and Romas) – **ESCALATED**

### Watch List









- Corn
- Eggplant
- French Beans
- Ginger
- Lettuce Romaine and VA Blends
- Lettuce Green Leaf and Red Leaf
- Melon - Honeydew
- Oranges
- Snow Peas & Sugar Snap Peas
- Spinach

### Weather









#### SALINAS, CA

Thu 9/12	Fri 9/13	Sat 9/14	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19
70°   51°F	69°   53°F	66°   56°F	63°   55°F	62°   52°F	66°   55°F	63°   54°F	67°   54°F
							
AM Clouds/PM Sun	Partly Cloudy	AM Clouds/PM Sun	Partly Cloudy	AM Showers	AM Clouds/PM Sun	AM Clouds/PM Sun	AM Clouds/PM Sun









#### OXNARD, CA

Thu 9/12	Fri 9/13	Sat 9/14	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19
71°   60°F	72°   60°F	70°   57°F	67°   57°F	67°   55°F	67°   56°F	67°   57°F	67°   57°F
							
Mostly Sunny	Partly Cloudy	AM Clouds/PM Sun	AM Clouds/PM Sun	Partly Cloudy/Wind	Partly Cloudy	Partly Cloudy	Mostly Sunny









## BAKERSFIELD, CA

Thu 9/12	Fri 9/13	Sat 9/14	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19
85°   64°F	92°   64°F	95°   66°F	90°   57°F	76°   56°F	79°   60°F	81°   59°F	80°   60°F
							
Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Mostly Sunny	Partly Cloudy


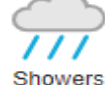
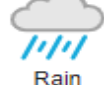
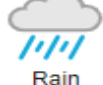
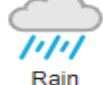
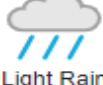
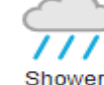
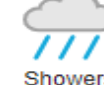
## JALISCO, NAYARIT

Thu 9/12	Fri 9/13	Sat 9/14	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19
82°   66°F	82°   66°F	82°   66°F	82°   66°F	83°   65°F	83°   65°F	82°   66°F	82°   67°F
							
Thunderstorms	Thunderstorms PM	Thunderstorms PM	Thunderstorms PM	Partly Cloudy	Partly Cloudy	Thunderstorms	Thunderstorms

## SAN QUINTIN, BAJA

Thu 9/12	Fri 9/13	Sat 9/14	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19
74°   65°F	74°   61°F	76°   62°F	75°   63°F	74°   60°F	74°   61°F	73°   63°F	74°   63°F
							
AM Clouds/PM	AM Clouds/PM	Partly Cloudy	Partly Cloudy	AM Clouds/PM	Sunny	Partly Cloudy	Partly Cloudy

## HENDERSONVILLE, NC

Thu 9/12	Fri 9/13	Sat 9/14	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19
72°   61°F	69°   63°F	69°   62°F	70°   60°F	71°   60°F	70°   60°F	73°   60°F	76°   60°F
							
Cloudy 1 AM 0.15 in	Showers 0.55 in	Rain 0.86 in	Rain 0.57 in	Rain 0.69 in	Light Rain 0.48 in	Showers 0.32 in	Showers 0.1 in

## Fruits & Vegetables

**Avocados: ESCALATED** Last week closed at a stable 53M pounds across all COO's, with Mexico easily adding on the volume that Peru and California are dropping. Over the next few weeks, projections for Mexico continue to get stronger, and with Loca behind its harvest schedule and Aventajada just around the corner, volumes to the US could easily exceed estimates in Q4. Standing inventories are down 3M pounds to 55.1M pounds, with the size curve reporting more 48s than in previous weeks. Last week only 2.4M pounds arrived to the US, the same week last year brought 8.4M pounds of Peru to the US. Year-to-date the season is -7% vs. last year for shipments to the US. 5.7M pounds came off the trees last week, and while the season is slowing the numbers continue to impress. This season is expected to close around 350M pounds, and very early estimates for the 2025 season are calling for north of 400M pounds.

**Bananas:** Steady supply and quality remain good across the country.

**Pineapples: ESCALATED** Supply was lighter this week and quality remains good. Sizing is going to be a challenge over the next few weeks, and we may need to be flexible on sizing as 5-6ct fruit is very short with 7-8's plentiful. The need to be flexible on sizing may be necessary to maintain consistent supply.

**Table Grapes:** Excellent supply will be available out of California this week. Quality out of California is mostly good as the crops are taking the heat wave better than expected. We are getting concerned the end of the season could fall short due to crop loss.

## Berries

**Strawberries: ESCALATED** Overall volumes continue to be limited due to heat-related quality issues. We should see an increase in production out of Santa Maria in the next few weeks. Watsonville/Salinas production has been steady, though overall output volume is decreasing week-over-week as we get further into the fall. We are expecting numbers to drop more drastically in late September through early October. Growers see darker, soft, and overripe fruit issues, along with mildew due to foggy mornings. Overall, small-to-medium size, strong red color, and good flavor. Labor is very tight; ranches are doing their best to keep up with harvest schedules. Weather has been hot for the past two weeks, with highs in the high 80's and overnight lows in the mid 50's. Fall Crop has continued to see good, strong fruit as the season continues to pick up every week. Plants are loaded with flowers, so we are expecting large numbers to be produced during the peak. Growers are expecting a good jump in estimates this week due to the hotter weather this past week. All fall crop acres are in a consistent harvest schedule and will be cycling some nice fruit, entering a peak in the middle of September and early October. Most blocks are showing good shape and firmness with a couple crooked tips and light bronzing around. Seeing some minor bruising in the pack, but nothing too concerning. SC organics will be steady for the next two or so weeks. We expect an increase in organic and conventional volume in this area in the coming weeks. Organic Spring Crop may be wrapping up soon, but Fall Crop is increasing in volume quickly to replace it. No labor issues.

**Blackberries:** Mexico's quality is decent, with sizing between the medium to large range, good sheen, mostly black, and good firmness. Due to high temps in the regions, we see red cell regression in some ranches and soft, leaking fruit as the days continue to be hot. Rain has caused some concern for instances of mildew. Blackberries' volume has passed its peak and will steadily decline throughout September until we pick back up in early October. Watsonville Blackberries are looking great, with medium-to-large sizing, and most have great flavor. The attached calyx and red cell regression is a minor occurrence, and we are seeing some issues with smaller fruit. Overall, production is strong and currently in our peak for blackberries in Watsonville. Fruit is testing high in brix as well. Growers are expecting continually strong production through early September.

**Raspberries:** Mexico's weather has been hot and humid, with temperatures in the high 70's to low 80s and nights in the low 60's. Overall, the fruit looks decent with a decent red color, with some fruit lighter in color in the pack due to picking a bit early ahead of the heat. Growers see some overripe, crumbled fruit and mildew from the high moisture environment from the rainy season, but crews are doing their best to keep them out of the packs. The volume of raspberries will start to pick back up as we progress through September.

**Blueberries: EXTREME** - The industry is currently experiencing a situation where demand surpasses supply due to a notable shortfall in blueberry production. This condition is anticipated to persist until imports from Peru and Central Mexico begin to arrive in the U.S. markets, with significant volumes expected in early to mid-November. Additionally, mid to late October is projected to witness the lowest overall volumes. In the Pacific Northwest, fresh production is concluding, as late-season high temperatures and rainfall have posed challenges, resulting in lower yields and compromised quality, including issues such as softness, shriveling, and mold. The "storage" blueberries, which were preserved in modified atmosphere containers to extend the season into September, are now exhibiting signs of early deterioration, and their quality does not meet the standards for fresh market packing, leading to a diversion of product to processing. Other domestic regions are also facing similar challenges; for instance, Michigan has experienced multiple rain events late in the season, yielding comparable results.

### Citrus

**Oranges: WATCHLIST** The California Valencia Orange crop continues to see challenges with quality and supplies as many growers/shippers are reporting lighter than normal supplies for the balance of the California Valencia season. Most shippers have curtailed harvesting, covering regular business only. Expect a "GAP" in production between the end of the Valencia season and the beginning of the Navel season, possibly up to 2 to 3 weeks. Expect prorates to increase as we continue through the balance of the Valencia season.

**Lemons: ESCALATED** Light supplies continue in California and will continue light until new crop District 3 lemons get started towards the end of September. 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 days/areas will be mandatory to get orders filled on orders loading in California!

**Limes: EXTREME** The market continues to increase as supplies significantly decline. In addition, extreme weather conditions in Mexico from high temperatures and humidity have affected quality, with all fruit showing light coloring and excess skin breakdown. We expect to see defects continue through September with little to no improvement before the end of September or beginning of October until the new growing areas get started. Due to the increasingly short supply, shippers are doing all they can to cover orders but "Please Expect Prorates" to orders as we work through the next couple of weeks.

**Grapefruit:** We continue to see significant changes in grapefruit from California, primarily due to the record heat through the summer. Look for record low pack outs and anticipate a gap in production until the Desert crop gets started in late October.

**Imports/Specialties:** Import lemons, oranges are arriving and mandarins are available.

### West Coast Lettuce

**Iceberg:** Lettuce supplies are looking very good. Quality also looks very good. Plenty of supplies right now.

**Iceberg VA:** Quality and supply both look very good.

**Romaine, & Romaine Hearts: WATCHLIST** Romaine and romaine heart supplies are good. Growers do expect yields to start dropping with fall approaching. Quality looks very good but there are still some darker leaves.

**Green Leaf and Red Leaf WATCHLIST:** Production in the Salinas Valley is steady. Overall quality is very good with good movement. Supplies have decreased a bit, so we are going to leave this one on the watch list.

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

## **Eastern and Western Vegetables**

**Green Bell Pepper:** Better supply this week out of Michigan, the Carolinas and West Coast as we get into the last summer regions of the season. Good supply on choice peppers with larger sizes drawing a premium. Overall quality is good.

**Color Bell Pepper: ESCALATED** Improving volume on red and yellow peppers this week. Supply out of Canada is stable. Orange pepper availability was lighter this week. Markets are still holding firm, and the quality is good.

**Mini Sweet Pepper:** Supply stable this week loading in California.

**Mixed Chili Pepper: ESCALATED** Supplies in general are good across most varieties out of Mexico and California. In the east, we could see gaps on hot peppers. The shortest items this week are fresno and serrano peppers.

**Eggplant: WATCHLIST** Tighter supply from all domestic growing regions is putting upward pressure on price and there are very limited crossings available in Nogales and McAllen. We suspect markets will be hit and miss now through the fall transition in late October.

**Slicer Cucumbers: ESCALATED** Supply will be lighter this week crossing through Otay and McAllen. Domestically, some of the local regions are scratching such as Tennessee and Michigan. Overall, the quality is good, but markets will be higher.

**English Cucumbers:** Light supply and good quality will be available this week. FOB prices remain high this week.

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

**Green Beans: Supply** remains light this week and quality hit and miss due to weather-related pressure.

**French Beans: WATCHLIST** Production continues to improve out of Guatemala. Supply out of the west remains fair with good quality.

**Zucchini/Yellow Squash:** Supply has tightened up in the east, particularly on yellow, while supply in the west is stable. Quality is good.

## **Herbs**

Good supply and quality on all herbs, except for thyme, which is being affected by weather in Mexico, Peru and Colombia. All Colombian herbs will be limited due to transportation issues in Colombia. This includes the majority of basil, thai basil, mint, oregano, rosemary, tarragon and thyme that we source. Ecuadorian/Mexican chives and Mexican sage should not be impacted. Chervil production continues to be low.

<b>HERB</b>	<b>SUPPLY</b>	<b>QUALITY</b>	<b>COUNTRY OF ORIGIN</b>
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:** We are starting to see Fall growing conditions as a decline in yields has started and has impacted the entire category from price to sizing where we are peaking on 9's. Weather patterns in the growing region over the past two weeks have peaked in the low 100's and dropping to highs in the low 80's. This stopping and going is stunting the growth of the melons. Cantaloupe production may begin to stabilize next week if fields are able to catch up, with sizing estimates still unknown. In the meantime, current harvests are showing excellent quality with nice straw color. Brix levels are mostly in the 12-14% range.

**Honeydew: WATCHLIST** Honeydew production has started to improve with a decent spread of sizing (5/6s) seen over the past few days this week rather than exclusively jumbo fruit as was reported last week. Overall availability remains limited, which is keeping the markets firm, but we can finally, confidently, cover all contractual commitments this week. Honeydew quality has been clean, strong and brix levels remain at mostly 12-14% levels.

**Golden Honeydew:** Done for the season.

**Watermelon:** Stable supply available and demand is light. Fruit is being harvested from a number of regions: Virginia, Maryland, California, Michigan, Texas as well as Mexico.

California Mixed Melon production will continue through mid-October with Yuma set to begin at that time and hope for seamless transition to the fall crop.

## **Mixed Vegetables**

**Artichokes: EXTREME ON SOME SIZES** Supplies are very tight and will remain that way for at least the next 2 weeks. The market is at the extreme trigger on the 12-24ct. Growers are holding to averages. Quality is good.

**Arugula:** Supplies and quality are both good.

**Asparagus: ESCALATED** Southern/Northern Baja production has remained the same this week. We should see better sizing starting next week. Peruvian volume continues to improve, but still with smaller sizing. Southern Peru has started to harvest. We should see better production within the next two weeks. Markets are active in all sizes.

**Bok Choy: ESCALATED** Quality is good but supplies are still limited. The light supplies will keep the market escalated.

**Broccoli/Broccoli Crowns: ESCALATED** Quality and supplies continue to improve but some growers are still seeing lighter supplies, keeping the market slightly escalated. If you are getting your product from Mexico, you may still be heavily prorated or cut completely for at least another week.

**Broccolini and Sweet Baby Broccoli:** Quality and supplies are good.

**Brussels Sprouts:** Quality and supplies are both looking very good.

**Carrots: (JUMBOS, MEDIUMS and CELLOS):** Steady supplies continue with good Quality. Supplies from Mexico are improving.

**Cauliflower:** Quality is looking good and supplies have improved.

**Celery:** Quality and Supplies are okay. There are some heat issues and insect pressures.

**Cilantro: ESCALATED** The market is active and supplies are very tight. High demand has continued. Growers should be able to cover normal volumes.

**Corn: WATCHLIST** 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 was lighter this week and they are dealing with quality issues. 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:** New crop California Garlic has started. The quality is very 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: EXTREME** Due to the extreme heat, the supplies remain very short on green onions. Prices are still at the extreme trigger and growers will still be holding to averages. Supplies are very tight.

**Mushrooms: ESCALATED** Supply was lighter this week, particularly on cremini's. In the west growers from Canada to California are dealing with supply shortfalls across the entire category due to weather impacts as well as virus pressure. We expect to see improved availability in approximately six weeks.

**Napa Cabbage: ESCALATED** 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.

**Red Cabbage: ESCALATED** Pricing is escalated and quality is good, although supplies continue to be tight. The market remains very active. You should expect this to stay escalated throughout the Salinas season.

**Spinach: WATCHLIST** Quality and supplies are improving

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

**Snow Peas and Sugar Snaps: ESCALATED** Guatemalan snow peas and sugar snap production continue to improve. Peruvian peas are available in Miami, but the quality is poor. Markets are less active on both peas, with more volume coming from Guatemala. Out of the west, the supply of snow peas is steady, and the supply of sugar snap peas and quality continues to improve.

### **Onions: ESCALATED**

The onion market has stayed steady. The Northwest is continuing to ramp up volume on all colors and sizes. Size profiles continue to peak on medium and jumbos on yellows, with colossal and super colossal few and far between in the early volumes, although they are starting to improve. There is a belief that this may be the pattern for the entire season, however, it is still early to tell. The cause of this would be the extremely hot summer they experienced here. We are still seeing reds and whites remain elevated, although they should begin to see some relief in the next few weeks. Yellows appear to have stabilized for the minute. There are still more shippers to enter the market, so we will see if the added supply will provide downward pressure. White onions are beginning to soften some as well as we are seeing growers begin to build up inventory of those. The overall 'feel' of the market is beginning to take shape, and it is believed to be a mostly average year for the most part. We will likely see a few lows and a few highs throughout the deal. There is concern about what demand may be like as we ramp up to the election. Historically speaking, demand takes a hit due to various external factors that have happened in the last few election seasons. We are also seeing trucks tighten up some with rates beginning to increase. We do not feel that freight will go any lower than it is today as we head into Q3 and Q4.

### **Potatoes:**

We are exclusively into new crop potatoes at this point in Idaho. The market took a significant increase between last season's old crop prices and the new crop Norkotah prices at the current market. We will likely see this situation remain in effect for another few weeks until additional shippers enter the market and inventories begin to build up. We are currently seeing a much bigger size profile than we have last year. 40ct through 70ct appear to be in good supply throughout the state, and 80s and smaller are on the tighter side. While this should differ some throughout the year as growers switch between lots, it does tell a story that the tuber counts are a lot lower this year than last year, which will mean less overall supply. We expect we will see the market dip in the short term on large size counts, but as we get into the new calendar year, we do expect to see a price increase. This should be the general pattern for next year as production and pack-outs will only worsen as we get later into the season. We anticipate that we will 'feel' this shortage as we get to about March of next year. There is concern about what demand may be like as we ramp up to the election. Historically speaking, demand takes a hit due to various external factors that have happened in the last few election seasons. We are also seeing trucks tighten up some with rates beginning to increase. We do not feel that freight will go any lower than it is today as we head into Q3 and Q4.

### **Tomatoes: East Coast**

- **Round Tomatoes: ESCALATED** Supply was lighter this week due to weather related delays on greens and VR's . We still recommend subbing to romas as we see volatility in the round market continuing through November. Tropical Storm Francine is expected to bring heavy rain to the eastern tomato growing regions; we will need to assess the harvest after the storm vacates the region. We do expect harvest delays over the next 2-3 days which could push markets higher.
- **Roma Tomatoes:** Despite the rain, supplies have been stable, and we do forecast a lighter harvest this week with markets firming up a tad. Overall quality will be good this week. Tropical Storm Francine is expected to bring heavy rain to the eastern tomato growing regions; we will need to assess the harvest after the storm vacates the region. We do expect harvest delays over the next 2-3 days which could push markets higher.
- **Grape Tomatoes:** Good supply available this week. Quality is outstanding. Tropical Storm Francine is expected to bring heavy rain to the eastern tomato growing regions; we will need to assess the harvest after the storm vacates the region. We do expect harvest delays over the next 2-3 days which could push markets higher.
- **Cherry Tomatoes:** Supply is stable with moderate demand. Quality is good. Tropical Storm Francine is expected to bring heavy rain to the eastern tomato growing regions; we will need to assess the harvest after the storm vacates the region. We do expect harvest delays over the next 2-3 days which could push markets higher.

### **Tomatoes: Mexico**

- Round Tomatoes: **ESCALATED** Growers are dealing with quality and supply issues out of Jalisco; the best quality is being harvested on the Baja. Volume was lighter this week crossing Otay and McAllen. We expect to see volatile markets continue through October where we will see flushes of fruit then tighten back up once again until November. We recommend subbing to romas to avoid supply interruptions.
- Roma Tomatoes: **ESCALATED** Stable but lighter supply available in Otay, while McAllen is seeing lower numbers and some weather-related quality pressure due to recent rain in Central Mexico. The best quality is crossing through Otay.
- **Grape Tomatoes:** Good supply available and quality is very nice.
- **Cherry Tomatoes:** Steady supply and good quality available crossing through McAllen and Nogales.
- **Medley Grape Tomatoes:** Good supply available this week and quality is good.
- **Tomato on the Vine:** Steady volume available this week.

### **California Tomatoes – EXTREME**

- There will be fruit available this week as growers break newer blocks and hopefully bring some stability to the market for the next few weeks, but the long-term forecast is for supply to be well below normal due to the damages caused by California's extreme heat earlier this summer. The season is expected to run through the middle of October, however need to be cautious of quality and supply shortfalls.

### **Other Fruit:**

**Apples:** Last year, Washington State Apple growers shipped just over 136 million boxes of apples. This year's total is projected at 124 million. Prices will likely be higher this year and much more manageable of a crop.

Projections below:

Red Delicious – 4 million down from last season

Gold Delicious – 280,000 boxes down from last season

Gr Smiths – 1.1 million boxes down

Fuji – 1.5 million boxes down

Gala – 3 million boxes down

Honeycrisp – 5 million boxes down

Cosmic – Up 2.7 million boxes.

**Pears:** The Northwest pear crop (Washington/Oregon) is substantially down from last season due to below average temps in late Feb/early March affecting bud development. The higher elevation areas in Washington were severely impacted, especially the Wenatchee Valley. The Oregon growing region was not affected as much as Wenatchee, Washington, but it was still impacted.

The Bartlett Crop out of the Northwest shows 3.8 million shipped last season vs a projected 2.9 million this year for a 14% decrease. It's not substantial in terms of overall volume, but it's still a factor. The cold temperatures will affect the grade, so more fancys will be packed than normal. Because the crop is smaller, the size profile has increased by 1 to 2 sizes. Barts to finish by the end of Feb/ first part of March.

Anjous report at least a 30% total decrease, or 1.85 million boxes less than last year. Also, out of the Wenatchee Valley, there will be more fancy and, for the first time in many years, a 3rd grade anjou packed. Anjous to start the week of September 16<sup>th</sup>.

Red Anjous are down 7% or 47,000 boxes. The question on Red Anjous is whether or not we will see smaller pears such as 120/135cts. Red pears are supposed to be 1 to 2 sizes larger out of the PNW. Red pears have started with Starkrimsons and will transition into Red Anjou from November through May.

Bosc are down 63% out of the great Northwest or 1.38 million boxes. This variety was mostly affected, and markets will be much higher than in previous years. Bosc has slowly started with a potential end date last January/middle of February.

**Cherries:** Finished for the season

**Pomegranate:** Light supply available this week.

**Tree Fruit:** Lighter supply available as the season winds down on Paches and Nectarines. Good volume available on red and black plums.

**Kiwi Fruit:** Supplies are tight out of Chile and markets are firming up.