

Weekly Market Review

October 18, 2024

Overview

HURRICANE HELENE & MILTON: The impacts from Hurricane Helene are being felt across the entire Southeast and now Florida has taken a direct hit by Hurricane Milton. We continue to keep those in harm's way in our thoughts and prayers. Based on these two events we expect the supply of fresh produce from South Georgia and Florida to be extremely volatile. In Florida it's too soon to assess, but the damage to crops and infrastructure will be severe. Commodities certain to be immediately impacted are the following: Citrus, Corn, Cotton, Tomatoes, Soft Squash, Bell Pepper, Eggplant, Peanuts, Pecans, Mixed Hot Pepper, Greens, Cabbage, Strawberries and Green Beans to name a few. We are working with our partners to keep you updated and appreciate your patience during these difficult times.

OTHER MARKET NOTES: Current table grape supply and demand out of California remain strong, however we do feel the season will come to a close early due to heat related crop losses. We do see the potential GAP in Nov/December. 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. Growers are hoping this will improve over the next six weeks. Lime volume is improving, but overall remains lighter than normal. Quality is improving as well as we are seeing new crop limes starting to cross from Mexico. Sizing will be heavy on small sizes as we transition from old crop to new crop. The supply chain is gradually regaining the momentum lost due to last week's rain market. Despite strong daily harvest figures, overall inventory levels in the US are on the decline. Avocado inventories in the US are back to healthy levels and store promotions have increased suitably to support Mexico's increase in production. The size curve continues to favor smaller fruit, but with the end of the rainy season and abundant sunshine, it won't take long for the crop to grow. For the short term, promotions on 60s and smaller are great for balancing the size curve with demand – think AFM bag promos for college football. As Christmas and the winter holidays approach more opportunities for promoting larger sized fruit will emerge. Transition is right around the corner! Some growers will be transitioning to Huron and other growers are just 4 to 5 weeks out before they get to Yuma. The heat related issues have reared their ugly heads as expected. The Market Alert was sent out on this so hopefully everyone was ready for the possible effects. Growers are doing their best to handle the situation, but harvesting has definitely decreased due to the heat and we will see some supplies start to decrease. To mention again, the weather in Yuma has also been very hot so some of the earlier crops in Yuma could be affected. We don't have any confirmation on that but an update in the report will follow as there is feedback from the growers. While the weather in Salinas has cooled down a bit, we will still see the effects from the heat over the next few weeks. Endive, escarole, leeks, cilantro and fennel are still escalated. Bok Choy has also stayed at the extreme trigger. It continues to be very light on supplies. Leeks and Broccolini have also gotten very light. Growers will be holding to averages on those items. Artichokes are still at the extreme trigger. While supplies are tight, they are starting to look better. Expect these to stay escalated throughout the month of October. Expect to see growers holding to averages on artichokes. For green onions, we are finally seeing some relief. They are still triggered slightly but they are no longer at the extreme trigger. Expect to see the market continue to come down on these. Broccoli is still escalated and there is some insect intrusion that is limiting what will be harvested. Broccolini is also very tight and most growers are holding to average. The Diamondback moth is still a large issue in the valley, and it is still affecting the broccoli, cauliflower and the cabbage fields. Expect the effects of the moth to run through the rest of the Salinas season. Green Cabbage is still escalated and will be for at least a few more weeks. Supplies will be limited on all cabbage items. There are some growers that will be prorating on shredded cabbage, but we should be fine on contract business. Open market business is likely being prorated or allocated to averages. Spinach is still escalated and growers are tight on supplies and there is some insect damage. Some growers may be prorating. To sum it all up, the heat and the Diamondback Moth are going to continue to cause a lot of issues over the next few weeks. We will keep an eye on the heat and will keep everyone updated but with transition around the corner and the moth and the heat in the mix, October is going to be a hectic month for the industry as a whole. Excessive heat in the San Joaquin Valley citrus growing areas have heavily affected supplies on the Valencia orange. Most shippers are reporting probable "Gaps" in production between now and the beginning of the Navel season.

Alert List

- Asparagus – **ESCALATED**
- Artichokes – **EXTREME ON SOME SIZES**
- Avocados – **ESCALATED**
- Bell Pepper (Green) – **ESCALATED**
- Blueberries – **EXTREME**
- Bok Choy – **EXTREME**
- Broccoli Florets and Crowns – **ESCALATED**
- Cabbage-Green-**ESCALATED**
- Cilantro – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Green Onions – **EXTREME-ESCALATED**
- Hot Peppers (Yellow Caribe, Habanero, Shishito) – **ESCALATED**
- Leeks – **ESCALATED**
- Limes – **EXTREME ON LARGE SIZES**
- Mushrooms – **ESCALATED**
- Napa – **ESCALATED**
- Lemons – **EXTREME ON SMALL SIZES**
- Oranges (Valencias) - **EXTREME**
- Parsley (Italian) – **ESCALATED**
- Pineapple – **ESCALATED**
- Romaine Hearts-**ESCALATED**
- Spinach-**ESCALATED**
- Slicer Cucumber
- Strawberries – **ESCALATED**
- Tomatoes (Rounds, Romas and Snacking Tomatoes) – **EXTREME**

Watch List

- Arugula-ADD
- Eggplant
- Lettuce Iceberg
- Broccoli
- French Beans -
- Lettuce Romaine and VA Blends
- Corn
- Ginger
- Lettuce Green Leaf and Red Leaf
- Cabbage - Red
- Green Beans
- Snow Peas & Sugar Snap Peas
- Cauliflower
- Lemons -
- Soft Squash

Weather

SALINAS, CA

Thu 10/17 65° 47°F Partly Cloudy	Fri 10/18 73° 46°F Sunny	Sat 10/19 77° 48°F Sunny	Sun 10/20 75° 49°F Mostly Sunny	Mon 10/21 73° 50°F Partly Cloudy	Tue 10/22 73° 52°F Partly Cloudy	Wed 10/23 77° 52°F Partly Cloudy	Thu 10/24 71° 55°F Mostly Cloudy
--	--------------------------------------	--------------------------------------	---	--	--	--	--

OXNARD, CA

Thu 10/17 67° 54°F Cloudy	Fri 10/18 73° 55°F Partly Cloudy	Sat 10/19 76° 55°F Sunny	Sun 10/20 73° 56°F Sunny	Mon 10/21 71° 56°F Partly Cloudy	Tue 10/22 71° 57°F Sunny	Wed 10/23 70° 58°F Partly Cloudy	Thu 10/24 68° 57°F Partly Cloudy
---------------------------------------	--	--------------------------------------	--------------------------------------	--	--------------------------------------	--	--

HERMOSILLO, SONORA

Thu 10/17 95° 71°F Sunny	Fri 10/18 90° 65°F Partly Cloudy	Sat 10/19 90° 63°F Sunny	Sun 10/20 94° 63°F Sunny	Mon 10/21 98° 66°F Sunny	Tue 10/22 101° 69°F Sunny	Wed 10/23 102° 71°F Sunny	Thu 10/24 102° 72°F Sunny
--------------------------------------	--	--------------------------------------	--------------------------------------	--------------------------------------	---------------------------------------	---------------------------------------	---------------------------------------

JALISCO, NAYARIT

Thu 10/17 85° 63°F Mostly Cloudy	Fri 10/18 84° 61°F Mostly Sunny	Sat 10/19 84° 64°F Mostly Sunny	Sun 10/20 87° 67°F Partly Cloudy	Mon 10/21 89° 68°F Partly Cloudy	Tue 10/22 84° 67°F Scattered Thunderstorms	Wed 10/23 83° 66°F Scattered Thunderstorms	Thu 10/24 83° 65°F Scattered Thunderstorms
--	---	---	--	--	--	--	--

SAN QUINTIN, BAJA

Thu 10/17 70° 58°F Partly Cloudy	Fri 10/18 70° 52°F Partly Cloudy	Sat 10/19 77° 56°F Sunny	Sun 10/20 78° 58°F Sunny	Mon 10/21 78° 58°F Sunny	Tue 10/22 75° 60°F Sunny	Wed 10/23 74° 59°F Sunny	Thu 10/24 73° 59°F Sunny
--	--	--------------------------------------	--------------------------------------	--------------------------------------	--------------------------------------	--------------------------------------	--------------------------------------

MOULTRIE, GA

Thu 10/17 68° 44°F Sunny	Fri 10/18 73° 51°F Sunny	Sat 10/19 77° 52°F Sunny	Sun 10/20 79° 51°F Sunny	Mon 10/21 81° 56°F Mostly Sunny	Tue 10/22 83° 58°F Sunny	Wed 10/23 83° 58°F Partly Cloudy	Thu 10/24 85° 58°F Partly Cloudy
--------------------------------------	--------------------------------------	--------------------------------------	--------------------------------------	---	--------------------------------------	--	--

QUINCY, FL

Thu 10/17 69° 44°F Sunny	Fri 10/18 76° 52°F Sunny	Sat 10/19 79° 54°F Sunny	Sun 10/20 80° 52°F Sunny	Mon 10/21 82° 57°F Mostly Sunny	Tue 10/22 85° 59°F Mostly Sunny	Wed 10/23 85° 58°F Mostly Sunny	Thu 10/24 86° 58°F Partly Cloudy
--------------------------------------	--------------------------------------	--------------------------------------	--------------------------------------	---	---	---	--

Fruits & Vegetables

Avocados: ESCALATED Last week closed 34% higher in volume than the previous week, bringing 66.2M pounds to the market. Mexico accounted for a 38% increase in their imported volume, and California continues to surpass expectations with another week

over 1M pounds. Peru is officially done for the season, and Chile is making a surprising, steady appearance. Standing inventories are finally picking back up – currently at 50M pounds. The sizing curve is trending toward 48s and larger. Dry matter is roughly 27%.

Bananas: Supply remains stable at the moment and shortages were averted as the strike has been postponed. Over quality remains good across the country.

Pineapples: ESCALATED Supply will remain very light for the next 6 to 8 weeks minimum due to harvest shortfalls; we 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. Quality is good.

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 This week's weather has cooled off, with daytime temps in the high 60s to low 70s and nighttime temps in the mid-50s. Production continues to decline steadily and quickly, but growers are maintaining high-quality packs with these cooler temperatures. Days are getting shorter as we get further into Fall, which limited the damages from last week's heatwave. Overall, production should be ending towards the beginning of November. The sizing has decreased a bit. Growers are seeing issues of darker, soft, small, and overripe fruit. Both methods have good sheen, small-to-medium size, strong red color, and good flavor. Labor is tight. Santa Maria last week's heat event brought temperatures in the mid-80s to low 90s, with some valleys exceeding 100°F. Temperatures returned to normal as the marine layer moved in on Tuesday, bringing wet mornings with dense fog that clears by mid-morning, leading to sunny conditions with highs in the 70s and lows in the 50s. This pattern is expected to continue through the weekend, with slightly cooler conditions next week and no rain forecasted. The heat negatively affected fruit quality, though not as severely as a summer event. Harvest crews managed to cull smaller and overripe fruit, but some softer fruit still made it into packs. Organic fruit faced more challenges due to smaller plant canopies and higher temperatures, but quality is stabilizing with good color and firmness. Production remains strong in middle and later plant blocks, with a slight dip expected in the coming weeks before tapering off in November. Organic fields saw setbacks from the heat but should recover by late October. Labor remains stable, although some crews are being redirected for spring crop planting. Overall, peak volumes are being seen and are on the rebound, with longer harvest days and robust control over pests.

Blackberries: Quality is decent and improving, with sizing between the medium to large range, good sheen, mostly black and with good firmness. Growers are seeing red cell regression in some ranches and some soft, leaking fruit. Despite these issues, the volume of blackberries is picking back up as we enter October, and we can assure you of a good, steady volume for the rest of the year. Watsonville Blackberries look decent, have medium sizing, and have a good flavor. Attached calyx and red cell regression is a continual occurrence, and we are seeing some issues with smaller fruit. Overall production volume has taken a steep cut as we enter a low of the season. The season could be ending soon. Limited availability.

Raspberries: Weather has been good as temperatures have cooled down in all regions as we enter the Fall season in Mexico. We are seeing temps in the low 80's and nights in the mid 50's. Looks like we are at the end of the rainy season for the year. Overall, the fruit is looking good with a strong red color, with some fruit lighter in color in the pack due to picking a bit early ahead of the heat. Sizes are mostly medium with larger berries here and there. The volume for raspberries is staying steady as we enter October. Watsonville Raspberries' production is recovering as we get a second wind through October. Overall, the color is a nice dark red color due to the warm temperatures underneath the hoops, and the sizing of rasps is a good medium size on average. Seeing some broken, green, and overripe fruit. Ok-to-good availability.

Blueberries: EXTREME The blueberry market faces a significant imbalance, with demand far exceeding supply. In the last five days, blueberry availability has dropped considerably as the domestic season comes to a close. Delays in imports from Peru and Central Mexico are anticipated, likely leading to a supply shortfall and lower overall volumes than initially projected for mid-October. For the next 2- 4 weeks, supply levels are expected to remain critically low until substantial shipments arrive from Peru and Central Mexico. During this timeframe, we will see significantly higher markets.

Citrus

Oranges: EXTREME The California Valencia orange crop is reaching the end of the season. Many shippers have finished and those that are still harvesting are facing extremely light supplies. Expect prorates to increase as we continue through the balance of the Valencia season. Navel season is projected to start with very light production the week of Oct 21st. Navel quality is looking very good with sizing projected to run heavier to the 88's, 113's and 138's to start the season.

Lemons: WATCHLIST: California District 3 has started with increasing supplies and quality coming from the Desert growing regions. Light supplies will continue in district 2 as the season is winding down with district 1 lemons starting mid-November. Import Lemons are nearing the end of the season. Market is steady.

Limes: EXTREME ON LARGE SIZES- Overall supplies are increasing. We are also seeing a slight increase in larger sizing although supplies continue to run heavy to smaller sizing with 230's and 250's being the higher percentage of the volume arriving from Mexico. We will continue to see some light coloring and skin breakdown, but quality continues to improve. The market is lower on all sizes. Long Range outlook: Due to growers having to get into fields early, we could see another significant overall shortage in production starting in late November and extending into December. More to follow on this as we get further into the New Crop season.

Imports/Specialties: California Mandarins will start November 1st .. We continue to see a gap in California Grapefruit, which will last for another 10-14 days.

West Coast Lettuce

Iceberg:-WATCHLIST-Lettuce has good supplies right now but with the recent warming trend, growers are forecasting yields to decline along with quality. Things seem to be tightening up a bit so this item is now on the watchlist. Some growers have made the transition to Huron so they are seeing some relief, but other growers will be riding it out in Salinas and we may see the effects of that soon. Quality looks good but we will be watching out for tip burn, more of a medium size, rib blight and some minor quality issues, Some growers are also seeing some soil borne diseases flaring up. We are going to keep this one on the watchlist through transition and it seems like the market is going to go up and we are going to see the normal issues we have going into transition every year.

Iceberg VA: Quality and supplies both look good for now but we will be keeping an eye on that warmer weather and how it will affect these crops.

Romaine, & Romaine Hearts: WATCHLIST Romaine, and romaine heart supplies are good but the heat is going to be a factor for this crop. Growers do expect yields to start dropping. With fall approaching and the warmer than normal weather, yields will be affected. Quality looks good but we are concerned with some internal burn from the warmer weather. Quality will likely be affected.

Green Leaf and Red Leaf WATCHLIST: Overall quality is fair. Supplies have decreased and we are seeing some mildew damage. The heat is hindering harvest and is reducing yields and there is potential for wilting and potential product burning. These items could be very effected depending the severity of the heat.

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

Eastern and Western Vegetables

Green Bell Pepper: WATCHLIST Markets are firming as local supplies wind down for the season in the east. Out west the valley is mostly done relying on Oxnard and Coastal Pepper until The Desert starts in two weeks. Markets are very tight in the west. Quality is hit and miss.

Color Bell Pepper: Improving volume on Red and Yellow Pepper this week. Supply out of Canada and Mexico are stable; Orange pepper availability was lighter this week. 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 on Jalapeno, Serrano and Poblano...Fresnos also seem to be improving. Caribes, Habanero and Shishito were the shortest this week. We still expect supply GAPS in the east due to weather.

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 early November.

Slicer Cucumbers: Supply is steady crossing through Nogales and McAllen. Domestically, we may see some supply GAPS due to Hurricane Helene in South Georgia over the coming weeks. Local regions are mostly done. Overall quality is good.

English Cucumbers: Light Supply and good quality will be available this week. FOB prices remain high this week; we hope to see some price relief in 2-3 weeks.

Pickles: Supply and quality are good this week.

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

French Beans: WATCHLIST Production has dropped off due to rainy weather in Guatemala, but the quality is fair. The supply and quality of French beans out of Mexico are fair.

Zucchini/Yellow Squash: WATCHLIST Supply remains hit and miss in the south while plentiful in Nogales and California. Heat in the west is pro-longing the season. Quality is good. We will start to transition to Fall crops over the next 2-3 weeks.

Herbs

We continue to see insect issues in the basil production. Imported chervil production is still low due to weather. Sage quality is being affected by rain in Mexico.

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: Production will wrap up over the next ten days and expect a smooth transition to the desert. Currently we are seeing primarily 9's out of the fields; Quality remains solid with good sizing, decent color and brix levels holding in a range of mostly 12-16%. Yuma production looks to start off strong with a good distribution of 9's and 12's.

Honeydew: Current crop is seeing some scarring but internally remain very good; this should clean up after we transition to the desert. Currently we are harvesting a decent spread of sizing (5/6s) We are seeing strong brix levels continue right around the 12-14% levels.

Watermelon: Lighter supply available and demand is light. Fruit is being harvested from a number of regions: California, Texas as well as Mexico. Summer regions are starting to wind down and will all transition South to either Mexico or Florida.

Mixed Vegetables

Artichokes: EXTREME Supplies remain limited and will continue to be tight for the next few weeks. The market is still at the extreme trigger on the 12ct, 18ct and 24ct and still escalated on the other sizes. Growers are holding to averages. Quality is good.

Arugula: WATCHLIST-The heat is already causing issues with Arugula, and we are already seeing lighter supplies. We are adding this one to the watchlist.

Asparagus: ESCALATED Southern/Northern Baja production has started to increase and should continue for the next three to four weeks. Quality is fair at best due to the heat in the region. Peruvian volume has also started to increase, which should continue for the next five to six weeks. Southern Peru continues to open more fields, which should help with bigger sizing. Markets have started to react, with both regions having improved production.

Bok Choy: EXTREME Quality is good but supplies are still limited. The light supplies are driving the market.

Broccoli/Broccoli Crowns: ESCALATED Quality is okay but some growers are still seeing lighter supplies. Insect intrusion is heavily limiting what will be harvested. Diamondback moth damage and larvae is still causing issues. Supplies are going to be limited for some growers for the rest of the season in Salinas. Some growers are seeing insect intrusion, brown bead and premature breakdown. This is all limiting the acres that can be harvested. Expect to see some growers holding to averages.

Broccolini and Sweet Baby Broccoli: WATCHLIST- Quality is good but supplies are very tight with most growers. Expect to see some heavy prorating on this item from some growers. The heat in the Salinas valley is causing stress on the plant and that is causing the yields to be low. Expect this item to be an issue throughout the month. Demand is very strong, and supplies are limited.

Brussels Sprouts: Quality and supplies both look very good.

Carrots: (JUMBOS, MEDIUMS and CELLOS): WATCHLIST - Jumbo Carrot supplies are light, but supplies remain steady on all other sizes and packs with good Quality.

Cauliflower: WATCHLIST Supplies are okay for now but quality is just okay. We are seeing similar insect damage as we have in broccoli. Cauliflower will remain on the watchlist as the Diamondback moth continues to affect harvesting and the heat becomes more of an issue.

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 Currently supply is hit and miss in the east due to transitional gaps and poor quality is prevalent due to insect pressure. We are still assessing losses but expect a major impact to the fall corn supply out of South Georgia and Florida from recent Hurricane damages. In the west, supply will be light until Mexico ramps up in November. Markets remain firm this week expected to go higher.

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

Leeks: ESCALATED- Leeks are very tight right now and some growers are holding to averages. The market remains escalated and will likely stay that way for the remainder of the Salinas season.

Garlic: New crop California Garlic has started. The quality is very good with very good demand.

Ginger: Supplies and market are steady

Green Cabbage: ESCALATED- Supplies are very limited and quality is fair. The damage from the Diamondback moth has limited the harvesting in the fields. There are some growers who will be heavily prorating orders that are not meant for concept business. Growers are doing their best to cover things but expect to see escalated pricing and prorating throughout the next few weeks.

Green Onions: EXTREME-ESCALATED- Supplies are still limited but we are finally starting to see relief on these. Prices are still triggered but only slightly. There is no longer an extreme market trigger. Some growers will be still holding to averages but things are improving. The market is coming down.

Mushrooms: ESCALATED Supply was lighter this week, particularly on Cremini's and Ports. 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 4 to 6 weeks.

Napa Cabbage: ESCALATED Quality and supplies are improving but there is some insect pressure.

Parsley: ESCALATED (Italian): Supplies are improving quality is fair. The Curley Parsley is no longer escalated, and the Italian is coming down. This item should see some relief soon.

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: WATCHLIST Pricing is no longer escalated. Quality is good but supplies continue to be tight. The market remains very active, so this item will remain on the watchlist.

Spinach: ESCALATED- Supplies are okay for now but we are seeing some insect damage, burn damage and inconsistent sizing. The heat has limited the acres that are being harvested. Pricing is now escalated.

Spring Mix: Supplies are good and quality is okay. Later shelf life is starting to show some breakdown and there is some thin texture caused by the rapid growth from the heat.

Snow Peas and Sugar Snaps: ESCALATED- Markets are very active. Rainfall has led to a reduction in the production of Guatemalan snow peas and sugar snap peas, while Peruvian output has also declined due to seasonal factors. Consequently, the domestic availability of snow peas and sugar snap peas is quite restricted.

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 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 Q4.

Tomatoes: East Coast

- **Round, Romas and Snacking Tomatoes: EXTREME** Over the past week the East Coast experienced significant impacts of Hurricane Helene and Hurricane Milton; the entire southern tomato crop from Tennessee/ North Carolina to Florida have seen catastrophic flooding and crop loss. Growers will be assessing losses over the next several days. Fortunately, we are seeing decent production out of Quincy, Bainbridge and Alabama but expect that to only last another three weeks tops. We anticipate active markets and short availability on volume over the next 6 to 8 weeks depending on the extent of the damage done in Immokalee and Ruskin.

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 but the volume will be down as they are wrapping up older blocks. Vizcaino will scratch this week but until then volume will be light as will the volume crossing from 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.

- **Roma Tomatoes: ESCALATED** Very light volume crossing through Otay and McAllen this week as growers transition from Summer to fall regions. Still the best quality is crossing through Otay. The volume is expected to be below normal for the next two weeks; overall markets will be very active due to the losses on the east coast and demand moving to Mexico.
- **Grape Tomatoes, Cherry Tomatoes and Medley Tomatoes:** Supply is tighter, and markets are firming up.
- **Tomato on the Vine:** Steady volume available this week.

California Tomatoes – EXTREME

- California will continue production and hopefully be able to compensate for some of the losses felt on the East Coast Post-Helene. Unfortunately, the long-term forecast is for supply to be well below normal due to the damage caused by California's extreme heat earlier this summer. The season is still expected to run through the middle of October; however, we 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 Fcys 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 anjous packed. When we start to pack Anjous – I will share pics of 3rd grade, this will be Your value pear. Anjous to start the week of September 16th, and if growers make it through June I will be surprised.

Red Anjous are down 7% or 47,000 boxes, so it is nothing dramatic like the others. 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.

Pomegranate: Good supply available this week.

Asian Pears: Peaking in volume Quality is outstanding

Tree Fruit: Lighter supply available as the season winds down on Paches; Nectarines are mostly done for the season. Good volume available on red and black plums through October

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

Persimmons: Active markets and quality is good on both Hachiya and Fuyu

Quince: Starting to harvest.