

# Weekly Market Review

## October 25, 2024

### Overview

The impacts from Hurricane Helene are being felt across the entire Southeast due to the impacts of Hurricane Milton; we continue to keep those in harm's way in our thoughts and prayers. We expect to see supply of fresh produce from South Georgia and Florida to be extremely volatile; in Florida it's too soon to assess all of the damage to crops and infrastructure that were severely impacted. 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. As of today, we are seeing some growers reporting total losses; some growers are projecting to salvage less than 30% of their crops and some will replant. Needless to say, the next 6 to 8 weeks will be incredibly challenging. 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 November/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. Avocados From Mexico has partnered with Rob Gronkowski for this football season, and with a continued focus on college football, avocados will continue to be front & center for all game-day celebrations. We have seen an increase in overall demand. Supplies and quality are good and expected to be through the remainder of the year. The countdown to Yuma continues! Some growers will be transitioning to Huron and other growers are just a few weeks out before they get to Yuma. The damage from the heat is now really being felt and we are seeing seeder in romaine and iceberg, brown bead in broccoli, wilting and insect pressure in baby leaf and poor shelf life with cilantro. The heat has really affected the leafy green quality. 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. The weather in Yuma has also been very hot, so some of the earlier crops in Yuma could be affected. While the weather in Salinas has cooled down a bit, we will continue to 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 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. Green onions are no longer triggered; supply and quality are finally improving. Broccoli has some insect intrusion that is limiting what will be harvested and Asian Cut Crowns are still escalated, but the other broccoli items have come off of the trigger for now. Broccolini is also very tight, and most growers are holding to averages. The Diamondback moth was a large issue in the valley, and affected 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. Between transition and the aftereffects of the heat and the Diamondback Moth, the next few weeks are going to be bumpy. We will keep everyone up to date on transition, but it looks like this year may see all the normal issues that we see during transition, plus a few extra because of the lasting heat affects.

### Alert List









- Asparagus – **ESCALATED**
- Artichokes – **EXTREME ON SOME SIZES**
- Avocados – **ESCALATED**
- Bell Pepper (Green) – **ESCALATED**
- Blueberries – **EXTREME**
- Bok Choy – **EXTREME**
- Cabbage, Green – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- **Green Beans- ESCALATED**
- Hot Peppers (Yellow Caribe, Habanero, Shishito) – **ESCALATED**
- Leeks – **ESCALATED**
- Mushrooms – **ESCALATED**
- Napa – **ESCALATED**
- Lemons – **EXTREME ON SMALL SIZES**
- Oranges (Valencia's) – **EXTREME**
- Parsley (Italian) – **ESCALATED**
- Pineapple – **ESCALATED**
- Romaine Hearts 48ct – **ESCALATED**
- Spinach – **ESCALATED**
- Strawberries – **ESCALATED**
- Tomatoes (Rounds, Romas and Snacking Tomatoes) – **EXTREME**

### Watch List









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

**Weather**









**SALINAS, CA**

Thu 10/24 77°   51°F  Partly Cloudy	Fri 10/25 75°   48°F  Partly Cloudy	Sat 10/26 76°   55°F  Cloudy	Sun 10/27 69°   51°F  Cloudy	Mon 10/28 62°   48°F  Partly Cloudy	Tue 10/29 61°   44°F  Partly Cloudy	Wed 10/30 63°   45°F  Partly Cloudy	Thu 10/31 64°   44°F  Partly Cloudy
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**OXNARD, CA**

Thu 10/24 73°   56°F  Partly Cloudy	Fri 10/25 68°   56°F  AM Fog/PM	Sat 10/26 70°   59°F  Mostly Cloudy	Sun 10/27 71°   58°F  Cloudy	Mon 10/28 67°   52°F  Partly	Tue 10/29 64°   50°F  Partly Cloudy	Wed 10/30 65°   50°F  Mostly Cloudy	Thu 10/31 66°   50°F  Partly Cloudy
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**HERMOSILLO, SONORA**

Thu 10/24 104°   72°F  Sunny	Fri 10/25 105°   73°F  Sunny	Sat 10/26 107°   73°F  Sunny	Sun 10/27 105°   71°F  Sunny	Mon 10/28 101°   69°F  Sunny	Tue 10/29 90°   60°F  Sunny	Wed 10/30 87°   58°F  Sunny	Thu 10/31 88°   59°F  Sunny
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**JALISCO, NAYARIT**

Thu 10/24 86°   64°F  Partly Cloudy	Fri 10/25 87°   64°F  Mostly Sunny	Sat 10/26 88°   64°F  Sunny	Sun 10/27 89°   64°F  Sunny	Mon 10/28 89°   63°F  Sunny	Tue 10/29 86°   62°F  Sunny	Wed 10/30 85°   62°F  Sunny	Thu 10/31 85°   63°F  Sunny
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**SAN QUINTIN, BAJA**

Thu 10/24 74°   56°F  Partly Cloudy	Fri 10/25 74°   57°F  Partly Cloudy	Sat 10/26 77°   60°F  Partly Cloudy	Sun 10/27 78°   61°F  Partly Cloudy	Mon 10/28 75°   59°F  Partly Cloudy/Wind	Tue 10/29 68°   53°F  Sunny/Wind	Wed 10/30 68°   55°F  Sunny	Thu 10/31 69°   55°F  Sunny
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**MOULTRIE, GA**

Thu 10/24 87°   57°F  Sunny	Fri 10/25 87°   58°F  Sunny	Sat 10/26 88°   59°F  Sunny	Sun 10/27 86°   61°F  Mostly Sunny	Mon 10/28 80°   58°F  Partly Cloudy	Tue 10/29 80°   62°F  Partly Cloudy	Wed 10/30 83°   59°F  Mostly Sunny	Thu 10/31 84°   60°F  Mostly Sunny
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**QUINCY, FL**

Thu 10/24 87°   56°F  Sunny	Fri 10/25 88°   58°F  Sunny	Sat 10/26 88°   58°F  Sunny	Sun 10/27 88°   61°F  Sunny	Mon 10/28 82°   58°F  Partly Cloudy	Tue 10/29 83°   62°F  Partly Cloudy	Wed 10/30 84°   59°F  Mostly Sunny	Thu 10/31 85°   60°F  Mostly Sunny
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**Fruits & Vegetables**

**Avocados: ESCALATED** Last week saw a reduction of 6M pounds of avocados vs. the previous week – for a total of 60.3M pounds. Mexico now has 97% market share, with California dropping almost 80% in volume. Mexico will feed the US through the holiday season, and there is some speculation that California will play a part in supplying Super Bowl LIX in February 2025. The size curve out of Mexico will continue to favor 60s and smaller through November and added promotional activity here is strongly encouraged. The dry matter average is 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** Overall volumes are slightly lower this week. The weather remains cooler, with daytime temperatures in the high 60s to low 70s and nighttime temperatures in the mid-50s. Production continues declining steadily and quickly, but growers maintain 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. 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 crop is just about finished as many shippers have finished and those that are still harvesting are facing extremely light supplies. Navel season has started, and the Navel quality looks very good with sizing projected to run heavier to the 88's, 113's and 138's to start the season. Although the Navel season has started, it is starting slowly so light supplies will continue through the end of the month of October.

**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. Market is steady.

**Limes:** Small-to-mid sized fruit is peaking, including 230's and 200's; 175's are becoming more abundant in supply. Overall quality has improved. Prevalent rain is expected in the growing areas of Mexico this week, which will help size-up the current crop. Expect small fruit to become less available in November.

**Imports/Specialties:** California Mandarins will start November 1<sup>st</sup>. 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. We do expect Iceberg to be an issue in the coming weeks. 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 light and some minor quality issues. Some growers are also seeing some soil borne diseases flaring up. We are going to keep this on the watchlist through transition. 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, plus the effects from the heat we had in Salinas and in Yuma already.

**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: 48CT HEARTS ESCALATED** 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 warmer than normal weather, yields will be affected. Quality looks good but we are concerned with internal burn from the warmer weather. Quality will be affected. Right now, some growers already have Romaine Hearts 48ct slightly triggered. We may see the market escalate more as we get closer to transition.

**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 affected depending on 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 remain firm this week with light volume in the East expected for some time due to the impacts of Hurricane Milton. In the West, light supply expected this week and should loosen up next week as the desert ramps up. Nogales is approximately three weeks from harvest. Quality is hit and miss.

**Color Bell Pepper:** Good 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. Jalapeno, serrano and poblano were lighter this week with caribes, fresno and shishito 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:** Markets were higher this week as demand ticked up; supply is steady crossing through Nogales and McAllen. Domestically, we may see some supply GAPS due to Hurricane Helene and Milton. The overall quality is good.

**English Cucumbers:** Improving supply and good quality will be available this week. FOB prices were mixed this week and we do feel some downward pressure on price as volume increases.

**Pickles:** Very short supply this week as Florida deals with the impacts of Milton; Mexico is scratching this week. Supply will be very tight for the next several weeks.

**Green Beans: ESCALATED** Green Beans will be a challenge throughout the entire holiday season. Currently supplies in the east are light due to the different storms that have hit the growing areas. This week, pricing for bushels is in the high 30's and expected to continue to increase daily. Shippers expect demand to stay steady over the next 10 days but once the holiday pull starts, they expect to see a decrease in volume upwards of 70% +/- of normal availability. With the severe losses in North and Central Florida combined with the shift in demand to Mexico and the desert, we will see major supply issue across the entire country.

**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 or miss in the South while plentiful in Nogales. California will wrap up over the next two weeks. Quality is mixed.

### **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:** California is mostly done for the season, and we have seen a smooth transition to the desert. Currently we are seeing primarily 12's out of the fields. Quality remains solid with good sizing and color will be greener than what we have seen all summer due to limited daylight and brix levels holding in a range of mostly 10-14%.

**Honeydew:** Current crops are 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 Texas as well as Mexico.

### **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 continued to increase and should continue for the next two to three 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: WATCHLIST** Quality is okay but some growers are still seeing lighter supplies. Insect intrusion is heavily limiting what will be harvested. 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. Asian Cut Broccoli Crowns are escalated at the moment, and we are watching the other broccoli items.

**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. Shelf-life has become an issue from the heat with some suppliers.

**Corn: WATCHLIST** Currently supply is hit or 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 and 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.

**Kale:** Kale supplies are expected to be below budget for the next few weeks.

**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, but expect to see escalated pricing and prorating throughout the rest of the Salinas season.

**Green Onions:** Supplies are still limited but we are finally starting to see relief. Prices are no longer triggered and we are seeing improvement from all suppliers. Some growers may still be holding to averages, but overall things are improving. The market is coming down.

**Mushrooms: ESCALATED** Supply was lighter this week, particularly on creminis 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. Supply will get tighter over the entire category as the Thanksgiving holiday will increase over the next couple of 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 still seeing some insect damage, burn damage and inconsistent sizing. The heat has limited the acres that are being harvested.

**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 remain very active. Recent rainfall has caused a decrease in the production of Guatemalan snow peas and sugar snap peas, and seasonal factors have also contributed to a decline in Peruvian output. Domestic supply of snow peas and sugar snap peas is significantly limited.

### **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 few weeks, Florida, which is the primary domestic production point for tomatoes over the next several months, experienced significant impacts from Hurricane Helene and Hurricane Milton and has seen catastrophic flooding and crop loss. Growers will be assessing losses but expect markets to be extremely short for the next 6 to 8 weeks. Fortunately, we are seeing decent production out of Quincy and Bainbridge, which is helping the current market, but will end soon. For the next several weeks we expect to see volume out of the region at 30% of the normal level. 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** We are seeing some improving numbers crossing from Jalisco, but the best quality is being harvested on the Baja. Overall volume will be at seasonal lows in general from all growing regions. Rounds seem to be the shortest, particularly on larger sized fruit. We expect to see volatile markets continue. We will see flushes of fruit then tighten back up over the next several weeks. Markets will see added pressure through the holidays as demand that would be pulling from Florida will shift West.
- **Roma Tomatoes: ESCALATED** Very light volume crossing through Otay and McAllen this week as growers transition from Summer to Fall regions. The best quality is still crossing through Otay. Volume should improve over the next week, but 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**

- The California season will wrap up over the next two weeks and limited supply is available.

### **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:** Mostly done for the season. Offshore fruit should arrive around Christmas.

**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.