

Weekly Market Review

November 7, 2024

Overview

The impacts from Hurricane Helene and Milton are being felt across the entire Southeast; 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 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, to name a few. As of today, we are seeing some growers reporting total losses and declaring Act of Gods, 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 with record high pricing, poor quality and limited availability. Current table grape supply and demand out of California remain strong, however, supplies are diminishing quickly, and we could see supply GAPS over the next several weeks on the West Coast as most of the offshore fruit on the front end of the season loads in the East. 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. Stability is attainable on smaller avocado sizes, and an adjustment to the size curve is expected to increase the availability for 48s while also reducing the pricing gap between size 48s and size 60s. Ongoing promotional efforts are recommended, and the implementation of sizing programs will play a critical role in ensuring a stable market as we close out 2024. Strong volume is anticipated throughout the holiday season and leading up to the Super Bowl. Maintaining an optimal balance between promotions by size and incoming inventory will be key to maximizing results and positioning for growth in 2025. Transition is in full swing and as predicted, we are seeing short supplies and escalating markets. The damage from the heat left lingering issues and we will feel those effects all the way through transition. Broccoli is very tight and will be prorated. While the heat negatively affected the broccoli market, the cold weather will now slow growth and make the market even worse. Growers are doing their best, but you can expect broccoli to be an issue through November, along with numerous other commodities. The weather in Yuma has been very hot, so some of the earlier crops in Yuma could be affected. We don't have confirmation yet but will update as we hear from growers. Endive, escarole, leeks, cilantro and fennel are still escalated and look to remain that way through transition. Bok Choy and artichokes have stayed at the extreme trigger and kale has also been added to the extreme trigger list. These items are all very light in supplies. Artichokes will continue to be held to averages. Leeks, romaine, lettuce, spinach, spring mix, cauliflower and broccolini are all very light in supplies. Growers will be holding to averages on these items. Spring mix is now escalated. Some sizes on spinach took a big jump in price due to severe shortages. Spring mix and spinach have suffered significantly lower yields due to a wide range of issues, including insect damage, mildew, external burn, leaf miner and thin texture. Spring mix only escalates when the whole industry is having supply issues and that is exactly what we are experiencing right now. Broccolini is also still very tight, and most growers are continuing to hold to averages. Green cabbage will stay escalated through transition. Supplies will be very limited on all cabbage items. There are some growers that will be prorating shredded cabbage. Open market business is likely to be prorated, and some growers will have no extra cabbage at all to fill non-contracted business. Between transition, the aftereffects of the heat and Diamondback moth, and now the cold weather moving in, the next few weeks are going to be rough. Lastly, with some growers loading out of Salinas and Yuma, there will be transfer fees on some items with some growers. This is normal and happens each year during transition. Please be aware that you may see some of these fees if you are loading in one location and not all the items have been transferred over to the new location yet.

Alert List

- Asparagus – **ESCALATED**
- Artichokes – **EXTREME ON SOME SIZES**
- Avocados – **ESCALATED**
- Bell Pepper (Green) – **ESCALATED**
- Bok Choy – **EXTREME**
- Broccoli, Florets and Crowns – **EXTREME**
- Cabbage-Green – **ESCALATED**
- Cauliflower – **EXTREME**
- Corn – **EXTREME**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Green Beans – **ESCALATED**
- Hot Peppers (Yellow Caribe, Habanero, Shishito) – **ESCALATED**
- Kale – **EXTREME**
- Leeks – **EXTREME**
- Lettuce, Iceberg and VA Blends – **EXTREME**
- Lettuce Romaine and VA Blends – **ESCALATED**
- Mushrooms – **ESCALATED**
- Napa – **ESCALATED**
- Parsley (Italian) – **ESCALATED**
- Pickles – **ESCALATED**
- Pineapple – **ESCALATED**
- Romaine Hearts – **EXTREME**
- Spinach – **ESCALATED**
- Spring Mix – **ESCALATED**
- Strawberries – **ESCALATED**
- **Table Grapes** – **ESCALATED**
- Tomatoes (Rounds, Romas and Snacking Tomatoes) – **EXTREME**

Watch List

- Arugula
- Broccolini
- Brussel Sprouts

- Cabbage - Red
- Eggplant
- French Beans
- Ginger
- Lettuce Green Leaf and Red Leaf
- Snow Peas & Sugar Snap Peas
- Soft Squash

Weather

SALINAS, CA

| Thu 11/7 | Fri 11/8 | Sat 11/9 | Sun 11/10 | Mon 11/11 | Tue 11/12 | Wed 11/13 | Thu 11/14 |
|------------|------------|---------------|---------------|------------|---------------|---------------|---------------|
| 75° 46°F | 73° 43°F | 68° 44°F | 68° 47°F | 66° 45°F | 66° 45°F | 69° 49°F | 66° 47°F |
| | | | | | | | |
| Sunny | Sunny | Partly Cloudy | Partly Cloudy | PM Showers | Partly Cloudy | Partly Cloudy | Partly Cloudy |

OXNARD, CA

| Thu 11/7 | Fri 11/8 | Sat 11/9 | Sun 11/10 | Mon 11/11 | Tue 11/12 | Wed 11/13 | Thu 11/14 |
|------------|------------|--------------|---------------|--------------|---------------|------------|---------------|
| 75° 51°F | 71° 49°F | 69° 50°F | 68° 51°F | 66° 51°F | 67° 55°F | 70° 54°F | 69° 52°F |
| | | | | | | | |
| Sunny | Sunny | Mostly Sunny | Partly Cloudy | Mostly Sunny | Partly Cloudy | Sunny | Partly Cloudy |

HERMOSILLO, SONORA

| Thu 11/7 | Fri 11/8 | Sat 11/9 | Sun 11/10 | Mon 11/11 | Tue 11/12 | Wed 11/13 | Thu 11/14 |
|------------|------------|------------|--------------|---------------|---------------|------------|---------------|
| 81° 50°F | 84° 53°F | 88° 54°F | 89° 56°F | 91° 59°F | 91° 59°F | 93° 61°F | 93° 63°F |
| | | | | | | | |
| Sunny | Sunny | Sunny | Mostly Sunny | Partly Cloudy | Partly Cloudy | Sunny | Partly Cloudy |

JALISCO, NAYARIT

| Thu 11/7 | Fri 11/8 | Sat 11/9 | Sun 11/10 | Mon 11/11 | Tue 11/12 | Wed 11/13 | Thu 11/14 |
|---------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 80° 62°F | 80° 59°F | 80° 59°F | 81° 59°F | 82° 60°F | 83° 60°F | 82° 60°F | 84° 60°F |
| | | | | | | | |
| Partly Cloudy | Partly Cloudy | Mostly Sunny | Mostly Sunny | Mostly Sunny | Mostly Sunny | Mostly Sunny | Mostly Sunny |

SAN QUINTIN, BAJA

| Thu 11/7 | Fri 11/8 | Sat 11/9 | Sun 11/10 | Mon 11/11 | Tue 11/12 | Wed 11/13 | Thu 11/14 |
|------------|------------|---------------|------------|---------------|------------|------------|--------------|
| 72° 48°F | 73° 47°F | 73° 49°F | 74° 53°F | 72° 54°F | 71° 54°F | 74° 58°F | 73° 56°F |
| | | | | | | | |
| Sunny | Sunny | Partly Cloudy | Sunny | Partly Cloudy | Sunny | Sunny | Mostly Sunny |

MOULTRIE, GA

| Thu 11/7 | Fri 11/8 | Sat 11/9 | Sun 11/10 | Mon 11/11 | Tue 11/12 | Wed 11/13 | Thu 11/14 |
|---------------|------------|---------------|------------|------------|---------------|--------------|--------------|
| 79° 71°F | 82° 67°F | 81° 67°F | 79° 67°F | 80° 57°F | 75° 53°F | 75° 56°F | 75° 49°F |
| | | | | | | | |
| Thunderstorms | Cloudy | Mostly Cloudy | Cloudy | AM Showers | Partly Cloudy | Mostly Sunny | Mostly Sunny |

QUINCY, FL

| Thu 11/7 | Fri 11/8 | Sat 11/9 | Sun 11/10 | Mon 11/11 | Tue 11/12 | Wed 11/13 | Thu 11/14 |
|------------|------------|---------------|------------|---------------|--------------|------------|--------------|
| 81° 70°F | 83° 67°F | 84° 67°F | 80° 67°F | 82° 57°F | 77° 54°F | 78° 56°F | 76° 51°F |
| | | | | | | | |
| Heavy Rain | Cloudy | Mostly Cloudy | Cloudy | Partly Cloudy | Mostly Sunny | Sunny | Mostly Sunny |

Fruits & Vegetables

Avocados: ESCALATED Overall imported volume was down another 10%, closing last week's total of 49.5M pounds for the US. That's a 25% reduction in volume over the mid-October high of 66M pounds. The industry has been adjusting since that peak 3 weeks ago, working to balance high inventories on select sizes with size curve shifts while encouraging promotional activity. Projections from Mexico call for steady, stable volumes over the next several weeks, and the bits of off-shore fruit are a welcome boost to support stability. The markets remain relatively steady. The dry matter average is 28%.

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 foreseeable future 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: ESCALATED Lighter supply will be available out of California this week as we are coming close to the end of the domestic season quickly. We could see some supply gaps on the West Coast until the offshore season fully kicks off. Quality from California is declining; we are seeing more ambering and shatter in the pack. Markets will be challenging through the holidays.

Berries

Strawberries: ESCALATED Strawberry supplies are expected to remain tight for the next 2-3 weeks until Mexico's volume ramps up. Temperatures remain chilly in Watsonville/Salinas, with daytime temperatures hovering around the mid-60s and nighttime lows dropping into the 40s. Production continues to decline, yet the quality remains decent, thanks to the cold. As we move deeper into Fall, the days are getting shorter, which may help a bit with quality. There's no rain in sight, and we're likely wrapping up the season in early November, if not sooner. The fruit is mainly medium-sized. However, there are notable issues with smaller, softer, and overripe fruit. While the fruit has decent sheen and color, the overall situation feels lackluster. Labor continues to be a challenge. The weather in Santa Maria remains cooler this week, with highs dipping to the upper 60s. While the cooler weather has marginally improved fruit quality, production has taken a nosedive this week. The combination of chilly nights and shorter days isn't helping much, despite some decent color and firmness in the fruit. Minor defects like green shoulders are popping up. Production has entered a post-peak phase, and we expect steady declines until a more significant drop late in November. The week's dip can be attributed to the cold weather and the seasonal shift, but labor issues remain manageable. Mexican production continues in small quantities. The fruit looks good, with occasional green tips and small-to-medium sizing. Florida's start date is still expected to be roughly three weeks late.

Blackberries: Quality remains decent-to-good and improving, with sizing between the medium to large range, good sheen, mostly black, and good firmness from Mexico. Growers see red cell regression in some ranches and soft, leaking fruit. Volume for blackberries is picking back up as we progress through October, and have good, steady volume for the rest of the year. Watsonville Blackberries look decent, have small-to-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 end soon.

Raspberries: Mexico's weather has been pleasant as temperatures have cooled further down in all regions as we enter the Fall season. We see temps in the low 80s and nights in the mid 50s. Overall, the fruit looks good with a strong red color; new varieties' sizes and firmness look good. Sizes are mostly medium, with larger berries here and there. Growers do see some overripe and crumbled fruit, but crews are doing their best to keep them out of the packs. Watsonville Raspberries' production is picking back up as growers get a second wind through October. We have entered peak production. Overall, the color is a nice dark red color due to the warm temperatures underneath the hoops, and the sizing of the rasps is a good medium size on average. Seeing some broken, green, and overripe fruit. Ok-to-good availability. Ending the season towards the end of November.

Blueberries: Blueberry supplies from Argentina, Peru, and Mexico continue to increase, and the market has decreased considerably. Production from Chile should begin to enter the markets in December.

Citrus

Oranges: Navels in California continue to improve as more growers get started and volume increases. Demand is good with very good quality. Smaller sizes are still prevalent, running heavy to 88s, 113s and 138s but as we get further into the season, we will see availability on larger sizes improve.

Lemons: Supplies continue to improve from the Desert growing regions with good quality. District 1 lemons will be starting mid-November. Market is steady.

Limes: The lime market is steady as quality continues to improve. Sizing continues to change as mid-to-large sized fruit is peaking, including 200s and 175s, with 150s increasing in supply. Expect small fruit to be light in supply through November.

Imports/Specialties: California Mandarins have started with very good quality. Grapefruit in the Desert growing regions of California has started. Supplies are light but improving and quality is good.

West Coast Lettuce

Iceberg: EXTREME Lettuce supplies are very tight as yields decline along with quality. Most growers are holding to strict averages. We do expect iceberg to continue to be an issue throughout transition. Some growers are now in Huron, but things are still tight. Quality looks good but weights are light. 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. The market is going to stay increased, and we are going to see the normal issues we have going into transition, plus the aftereffects from the heat we had in Salinas and potentially the heat in Yuma.

Iceberg VA: ESCALATED Quality and supplies both look good for now, but we will be keeping an eye on how transition will affect things.

Romaine, & Romaine Hearts: EXTREME Romaine and romaine heart supplies have gotten very tight. We are seeing light weights and growers holding to averages. Growers are all seeing lower yields across the valley. Quality looks good but we have seen some

internal burn, along with twisting and ribby leaves from the warmer weather. Quality will continue to be affected as we go into transition. The market is escalated and will most likely stay that way well into the Yuma season. So far, Yuma romaine is looking good.

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, with potential for wilting and product burning. With transition closing in, we will keep these on the watchlist.

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

Eastern and Western Vegetables

Green Bell Pepper: ESCALATED Markets remain firm this week with light volume in the East expected for some time due to the impact of Hurricane Milton. In the West, light supply is expected this week and should loosen up next week as the desert ramps up. Nogales is approximately two weeks from harvest. Quality is hit or miss.

Color Bell Pepper: Lighter volume on red and yellow pepper this week; supply out of Mexico was stable. Markets will remain higher until we see more consistency in supply. That being said, we do expect to see Desert reds start this week which may bring some relief to the market. Quality being packed is mostly 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, Habanero, Serranos and Poblano were lighter this week. Caribes, Fresnos, and Shishitos are 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: Good supply crossing through Nogales and McAllen. Domestically, we may see some supply GAPS due to Hurricane Helene and Milton impacting the East Coast. The overall quality is good.

English Cucumbers: Strong and improving supply kept pricing firm this week. Quality on new crop out of Mexico was good.

Pickles: Improving supply available crossing through Nogales, the Florida season will be altered due to the impacts of Milton; Supply will be hit and miss over the next several weeks.

Green Beans: ESCALATED Green Beans will be a challenge through 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 continues to drop off out of Guatemala due to rainy weather. Quality is also being affected by rain. Fair supply and good quality of French beans out of Mexico.

Zucchini/Yellow Squash: WATCHLIST Supply remains hit and miss in the south while plentiful in Nogales, California will wrap up over the next two weeks. Quality is mixed.

Herbs

Basil quality continues to improve. Imported chervil supply is still low due to weather. Dill and 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: Currently we are seeing primarily 12's out of the fields. Quality remains solid with good sizing; color will be greener than what we have seen all summer due to limited daylight, brix levels holding in a range of mostly 10-14%.

Honeydew: Current crop is seeing some scarring but internally remains 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. Growers are holding to averages. Quality is good.

Arugula: WATCHLIST The heat caused some issues with arugula and we are seeing lighter supplies. Growers are holding to averages. We are keeping this one on the watchlist.

Asparagus: ESCALATED Southern/Northern Baja production has started to decrease due to seasonality. Quality continues to be fair at best due to heat in the growing region. Sizing is also heavy on standard and very light on larger sizes. Peruvian volume remains steady, which should continue for the next four to five weeks. Production on the larger sizes continues to improve. Markets continue to be sluggish on smaller sizes and stronger on larger sizes. Peruvian FOBs are expected to increase within the next 7-10 days due to Mexico's transition and the expected Thanksgiving pull.

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

Broccoli/Broccoli Crowns: EXTREME Quality is okay, but growers are seeing much lighter supplies. Insect intrusion is heavily limiting what will be harvested. Supplies are going to be limited for most 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 growers holding very strict averages and some will be heavily prorating. Some growers are currently at the extreme trigger. Broccoli is going to be affected well into the Yuma season since the desert had extreme heat the last 2 months. Expect broccoli to remain tight and escalated throughout the month.

Brocolini 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 caused stress on the plant which caused the yields to be low. Expect this item to be an issue throughout transition. Demand is very strong, and supplies are limited.

Brussels Sprouts: Quality and supplies both look very good, but some growers are escalated on the VA packs. .

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: EXTREME Supplies are tight and quality is just okay but will improve once we get into Yuma. We are seeing similar insect damage as we have in broccoli. Some growers are holding to strict weekly averages.

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 issue has become an issue from the heat with some suppliers.

Corn: EXTREME 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 are 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: ESCALATED Kale supplies are expected to be below budget for the next few weeks.

Leeks: EXTREME Leeks are very tight right now and some growers are holding to averages. The market remains escalated and will likely stay that way throughout November.

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. Growers are doing their best to cover, but expect to see escalated pricing and prorating throughout the rest of the Salinas season. Relief will come once everyone is settled into Yuma.

Green Onions: Supplies are still limited but we are finally starting to see relief on these. Prices are no longer trigger and we are seeing improvement from all suppliers. Some growers may still be 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. 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 very tight. We are still seeing some insect damage, burn damage and inconsistent sizing. The heat has limited the acres that are being harvested. Some growers are holding to strict weekly averages.

Spring Mix: ESCALATED Supplies and quality are very limited. The fields have very low yields due to heat, insect damage, mildew and other factors. Later shelf life is starting to show some breakdown and there is some thin texture caused by the rapid growth from the heat. Some growers are holding to strict weekly averages. This item only escalates when there is an industry wide issue and unfortunately, that is where we are at right now.

Snow Peas and Sugar Snaps: ESCALATED Markets remain very active on both coasts. Due to rain, Guatemalan snow peas and sugar snap peas production continues to decrease. Peruvian production is also down due to seasonality. Out of the West, the supply of snow peas and sugar snap peas is very limited. Mexican production is about a week away.

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 for 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 see 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 20% or less of the normal levels. Act of God declarations have been made by several East Coast suppliers. 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: EXTREME** Lighter numbers this week crossing from all shipping points. Large fruit is the shortest; overall volume will be at seasonal lows in general from all growing regions. 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 due to the devastation caused by Hurricane Milton.
- **Roma Tomatoes: EXTREME** 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

- Done for the season.

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.