

Weekly Market Review

November 22, 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 5 to 6 weeks will be incredibly challenging with record high pricing, poor quality and limited availability. Current table grape supply out of California continues to dwindle and should be done by the end of the month; some shippers sooner than others. 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. This should start to improve by Late December as more offshore fruit fills the supply chain. 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 five weeks. Avocado demand for fruit remains high than expected and volumes are just light enough to support higher field prices. The size curve continues to favor the 60s and smaller, but instead of larger fruit coming down in cost to narrow that pricing gap between 48s and 60s, the smaller fruit is increasing to catch up to the larger. The 'sizing-up' of the size curve remains the biggest wild card. Several factors at play have pushed back the availability of larger fruit: late rainy season and higher dry matter requirements – making the closing of this year very different from years past. Transition is winding down and we are continuing to see short supplies and escalating markets. The damage from the heat left lingering issues and we are feeling those effects all the way through transition. Broccoli is still very tight and will likely 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 into December, along with numerous other commodities. The weather in Yuma was very hot when the early planting was done, so some of the earlier crops in Yuma were affected. Some growers had to replant. That has been one of the factors in the yields continuing to be low as we move to Yuma. Endive, escarole, leeks, cilantro and fennel are still escalated and look to remain that way through the year. Bok Choy, Broccoli, Iceberg, Romaine, Spring Mix and Artichokes have stayed at the extreme trigger. These items will be held to averages. All of these items are all very light in supplies. Growers will be holding to averages and it is very likely that you will see prorates. 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. Broccoli is also still very tight, and most growers are continuing to hold to averages. Green cabbage and Brussel Sprouts will stay escalated into December. Supplies will be very limited on all cabbage items and Brussel Sprouts are in higher demand with the holidays approaching and some supplies are starting to be tight on supplies. Between transition, the aftereffects of the heat and Diamondback moth, and now the cold weather moving in, Transition is going to continue to be rough. Lastly, with some growers still 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. Most growers are in Yuma now, but we do still have a few growers still in the process with some items. We have about a week to 10 days left before we are through Transition so, please just know that we are working with the growers and trying to get through this the best we can! While things will improve once we are in Yuma, we will still see some issues throughout December on some items. With Salinas ending early and growers having to pull sooner than expected from Yuma, it will take a little while until everyone is all caught up and back to regular business.

Alert List

- Asparagus – **ESCALATED**
- Artichokes – **EXTREME**
- Avocados – **ESCALATED**
- Arugula-**EXTREME**
- Bell Pepper (Green) – **ESCALATED**
- Bok Choy – **EXTREME**
- Broccoli, Florets and Crowns – **EXTREME**
- Brussel Sprouts-**ESCALATED**
- Cabbage-Green – **ESCALATED**
- Cauliflower –**EXTREME**
- Celery-**ESCALATED**
- Corn – **EXTREME**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Green Beans – **ESCALATED**
- Hot Peppers (Yellow Caribe, Habanero, Shishito) – **ESCALATED**
- Leeks – **EXTREME**
- Lettuce, Boston-**ESCALATED**
- Lettuce, Iceberg and VA Blends – **EXTREME**
- Lettuce Romaine, Romaine Hearts and VA Blends – **EXTREME**
- Lettuce, Green Leaf and Red Leaf-**ESCALATED**
- Mushrooms – **ESCALATED**
- Napa – **ESCALATED**
- Parsley (Italian & Curly-) – **ESCALATED**
- Pickles – **ESCALATED**
- Pineapple – **ESCALATED**
- Spinach –**ESCALATED**
- Spring Mix –**EXTREME**
- **Salad Mixes (Heritage, Arcadian Tuscan, Etc.)-EXTREME**
- Strawberries – **ESCALATED**
- **Table Grapes – ESCALATED**
- Tomatoes (Rounds, Romas and Snacking Tomatoes) – **EXTREME**

Watch List

- | | | |
|------------------|-------------|--------------------------------|
| 1. Broccoli | 3. Eggplant | 5. Snow Peas & Sugar Snap Peas |
| 2. Cabbage - Red | 4. Ginger | 6. Soft Squash |
| | | 7. Limes |

Weather

OXNARD, CA

Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	Wed 11/27	Thu 11/28
65° 48°F	62° 53°F	60° 54°F	62° 51°F	61° 52°F	63° 53°F	63° 51°F	63° 47°F
Mostly Sunny	Partly Cloudy	Showers	AM Fog/PM	Showers	AM Showers	AM Clouds/PM	Partly Cloudy

YUMA, AZ

Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	Wed 11/27	Thu 11/28
81° 48°F	81° 47°F	80° 52°F	77° 53°F	79° 53°F	77° 56°F	75° 53°F	73° 51°F
Partly Cloudy	Sunny	Sunny	Mostly Cloudy	AM Clouds/PM	Mostly Cloudy	Partly Cloudy	Partly Cloudy

HERMOSILLO, SONORA

Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	Wed 11/27	Thu 11/28
90° 54°F	90° 56°F	88° 57°F	87° 56°F	87° 57°F	88° 57°F	84° 55°F	83° 55°F
Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Cloudy	Cloudy	Partly Cloudy	Mostly Cloudy

JALISCO, NAYARIT

Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	Wed 11/27	Thu 11/28
83° 59°F	83° 58°F	81° 56°F	80° 57°F	80° 56°F	81° 56°F	79° 55°F	80° 55°F
Partly Cloudy	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Sunny









VIZCAINO, BAJA

Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	Wed 11/27	Thu 11/28
90° 53°F	89° 51°F	84° 51°F	81° 54°F	84° 58°F	87° 57°F	82° 56°F	78° 56°F
Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Cloudy	Mostly Cloudy	Mostly Cloudy	Mostly Cloudy









CULICAN, SINALOA

Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	Wed 11/27	Thu 11/28
97° 59°F	96° 61°F	94° 63°F	91° 61°F	92° 60°F	91° 59°F	88° 58°F	88° 57°F
Sunny	Sunny	Sunny	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy

QUINCY, FL

Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	Wed 11/27	Thu 11/28
63° 40°F	60° 37°F	64° 37°F	71° 44°F	76° 55°F	78° 57°F	74° 54°F	75° 53°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy

IMMOKALEE, FL

Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	Wed 11/27	Thu 11/28
72° 48°F	71° 45°F	70° 44°F	76° 52°F	81° 57°F	82° 57°F	83° 61°F	86° 61°F
							
Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny	Sunny	Mostly Sunny

Fruits & Vegetables

Avocados: ESCALATED Imported volume increased 7% last week, bringing a total of 54.9M pounds to the US. Projections from Mexico call for steady, stable volumes over the next several weeks, and the bits of offshore fruit are a welcome boost to support stability. Markets have increased slightly across most sizes. The industry continues to see a large price gap between large and small fruit due to the current size curve, which is heavier on smaller sizes. The dry matter average is 28.5%.

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 Current table grape supply out of California continues to dwindle and should be done by the end of the month; some shippers sooner than others. Greens will be out first. 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. This should start to improve by Late December as more offshore fruit fills the supply chain. Quality will be mixed for the next several weeks, we will see elevated shatter, amber in any lingering greens in the market and shorter shelf life.

Berries

Strawberries: ESCALATED Strawberry supplies remain limited but should increase, with Mexico and Florida ramping up over the next few weeks. Watsonville/Salinas production is nearing its seasonal end and is expected to wrap up before Thanksgiving. Cooler temperatures (highs in the 50s-60s, lows in the 30s-40s) and light rain have reduced yields but maintained high-quality packs with small-to-medium fruit. Some slight quality issues include lighter color, green shoulders, and soft or overripe fruit. Labor remains tight. Santa Maria saw cooling temperatures (50s-60s daytime, mid-30s nighttime), and light showers are impacting production, which is declining at 10-15% weekly for conventional crops, with steady but expected drops in organic production. Fruit quality is high with good firmness, sheen, and flavor, though defects like pin rot and green shoulders persist. Hooped acreage aids ripening and frost protection. Mexico's weather remains favorable, with steady production increases expected through December. Quality is high with occasional green tips and medium-sized fruit. Florida's initial harvests of small, misshapen fruit are expected to improve weekly.

Blackberries: Quality is improving out of Mexico with medium-to-large berries featuring good sheen, black color, and firmness. Some challenges include red cell regression and soft fruit. Volume is expected to be stable through the end of the year. Out of Watsonville, small-to-medium berries are of decent quality and have good flavor. Persistent issues include red cell regression and attached calyx. The season is expected to conclude soon with minimal availability.

Raspberries: Steady production out of Mexico with medium-to-large fruit showing strong red color and good firmness. Overripe and crumbled fruit issues are being managed. Transfers to Texas starting November 18th will ensure fresher supply for the remainder of the season. Limited availability out of Watsonville as production declines sharply. Fruit quality is fair, with medium sizes, but issues such as overripe and broken berries. The season is nearing its end.

Blueberries: Steady production growth with peak season anticipated in November-December out of Mexico. Quality is excellent, with minimal shriveling or leakage. Out of Peru, peak harvest continues with shipments of bulk and pre-packed containers arriving weekly. Fruit is firm with consistent quality. Organic supply will increase by December. Occasional port delays noted. Early harvest is underway in Chile, and it is of good quality (large size, sweet flavor, firm texture). Volume is expected to increase in December, with peak production at month's end. Weekly arrivals of conventional and organic containers are expected, with minor port delays anticipated.

Citrus

Oranges: Quality of new crop Navels from California is still very good with sizing still running heavy to 88s, 113s and 138s. 72's and larger continue to be in light supply but we will see the availability of larger sizes improve as we get further into the season,

Lemons: Supplies continue to improve from the Desert-growing regions with very good quality. District 1 has started with light supplies. Market is steady.

Limes: We continue to see sizing running heavy to large sizes. Current weather conditions and holiday harvest slowdown is impacting availability of smaller sizes (230 and 250), which remain tight. Market is currently steady from last week, but we expect the market to strengthen as we move into December with higher pricing, especially on small sizes.

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, quality is good. Cara Cara's have started in a light way, but volume will be increasing through the end of the month. The month of December will have very good volume with promotable volume. Cara Cara's will start Mid-December.

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. Quality looks okay but the 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 is going to be heavily affected in the next few weeks.

Iceberg VA: EXTREME Quality is okay, and supplies are very tight. You will likely see growers holding to strict averages and some will be prorating.

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.

Romaine VA: EXTREME Quality is okay, and supplies are very tight. You will likely see growers holding to strict averages and some will be prorating.

Green Leaf and Red Leaf: ESCALATED 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. The Green Leaf and Red Leaf Filets/Singles are all escalated.

Butter/Boston: ESCALATED Supplies have gotten very tight and will remain that way through Transition.

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. In Nogales we are seeing light supplies and expect that to improve over the next ten days. 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 scratching 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, Serrano 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 region keeps upward pressure on price; there are a few more crossing in Nogales and McAllen. Quality is good. Markets should improve after Thanksgiving.

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: WATCHLIST 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 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 HEAVY 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: ESCALATED Production continues to improve, but demand will continue to exceed supply due to the forthcoming holiday season and the impacts of Tropical Storm Sara. The supply of French beans from Mexico remains fair and of good quality.

Zucchini/Yellow Squash: WATCHLIST Supply firmed up this week out of Nogales and Florida, Georgia is done for the season. With the transition in full play, limited supply due to cooler weather we expect light supply for the next week. Quality is good in all regions.

Herbs

Basil supply and quality are moderate, impacted by weather-related challenges. Sage remains in limited supply, although there are signs of improvement. Chives production has decreased as a result of weather conditions.

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: Our offshore season started with cantaloupe arrivals into Florida yesterday; the current sizing profile is leaning to 9/12s initially, but we expect to see a shift to larger fruit by early next week's arrivals. We are very happy with the quality of the first fruit. Melons are clean and solid. They carry a slight green caste with brix levels hovering in the 11-15% range. Offshore honeydews will begin by later next week, but we will be bringing dewes in to cover all mixer orders.

Offshore fruit will begin to arrive in ports (Northeast, Texas and California) other than Florida after Thanksgiving. To ensure coverage into those ports please be sure to communicate your needs well ahead of time so we can properly coordinate.

Honeydew: Current crop is seeing some scarring but internally remains very good; this crop will end by next week and transition to offshore fruit after Thanksgiving. 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: ESCALATED The heat caused some issues with arugula and we are seeing lighter supplies. Growers are holding to averages.

Asparagus: ESCALATED Southern/Northern Baja production is still low due to seasonality. Northern Sonora (Caborca) should start in the next two to three weeks. Peruvian volume remains steady, which should continue for the next three weeks. Production of larger sizes continues to improve. Markets continue to be less active, but that should change next week because of holiday demand.

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 at least a few more weeks. Some growers are seeing insect intrusion, brown bead and premature breakdown. It has also been cold in the mornings in Yuma and that is not helping the broccoli grow. This is all limiting the acres that can be harvested. Expect to see growers holding very strict averages. Some growers are currently at the extreme trigger.

Broccolini and Sweet Baby Broccoli: WATCHLIST Quality is good, but supplies are very tight with most growers. Expect this item to be an issue throughout transition. Demand is very strong, and supplies are limited.

Brussels Sprouts: ESCALATED Quality looks very good, but some growers have tight supplies and it is driving the market up.

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 settle into Yuma. We are seeing similar insect damage as we have in broccoli. Some growers are holding to weekly averages.

Celery: ESCALATED: Quality is good supplies are okay. Growers are able to cover contract business, but they are holding to averages. There are some heat issues and insect pressures.

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: Kale is escalated in some markets. Supplies are light with some growers, but quality is good.

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 the year.

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

Ginger: Supplies and market are steady

Green Cabbage: ESCALATED Supplies are still limited and the quality is improving. Some growers are still prorating but things are improving. Growers are doing their best to cover but expect to see escalated pricing for the next few weeks. Relief will come once everyone is settled into Yuma and they can catch up with production.

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& Curly): Supplies are improving but the light supplies in some markets is driving the market. Quality is okay.

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: EXTREME 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 Guatemalan snow pea production has seen an improvement this week and is expected to enhance further next week. However, the production of sugar snaps is declining due to adverse weather conditions. The seasonality has led to the conclusion of Peruvian snow peas and sugar snap production. The domestic supply of snow peas and sugar snaps is quite limited. Mexican production of snow peas has commenced, with sugar snaps anticipated to be available in 7 to 10 days. The markets remain highly active.

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 entering 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, 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 had 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, 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 Fancy's 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 are good on both Hachiya and Fuyu

Quince: Starting to harvest.