

# Weekly Market Review

## December 12, 2024

### Overview

The impacts from Hurricane Helene and Milton are expected to be felt across the entire Southeast through the end of the year and as we approach the Holidays, we continue to keep those in harm's way in our thoughts and prayers. We expect to see the supply of fresh produce from Florida to be extremely volatile through the end of the year. We are mostly done now with the harvest in Georgia until the spring. Commodities still feeling the impacts are the following: Citrus, Corn, Cotton, Tomatoes, Soft Squash, Bell Pepper, Eggplant, Peanuts, Pecans, Mixed Hot Pepper and Green Beans, to name a few. We are currently harvesting from regions that saw tremendous losses; some growers are in Force Majeure still as they deal with poor quality, 50% plus loss to crops and limited availability. This should all slowly improve as we move further south into the Immokalee districts between now and January. Current table grape supply out of California is very limited and transition to offshore is underway; we could see GAPS supply over the coming weeks on the West Coast as most of the offshore fruit on the front end of the season loads in the East. Fortunately, some growers are able to transfer fruit to maintain supply. Markets will be hit and miss through the first week of January. 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. Honeydew will be a challenge over the next three weeks; transition combined with delays due to weather in South America have limited availability and quality fruit. Flexibility is very important during this transition to limit the portions of honey being served or outright subs if there are any shortages. Supply should improve over the next three weeks. 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. Large fruit continues to command a premium due to the current size curve; however, the price gap between 48s and 60s is projected to narrow as availability increases. Looking ahead, strong sales and promotion opportunities are anticipated in the coming month. As this trend persists, the industry will likely shift back to favoring larger-sized avocados. With an ample supply of 48ct and smaller avocados, the industry can support a balanced mix of sizing for various programs. Additionally, the official release of California's harvest for 48 count and larger avocados is expected this week, raising questions about whether California will make an appearance for the Super Bowl this year. While the past two seasons have seen minimal January volumes from California, history shows potential; in 2022, over 13 million pounds were harvested for the Super Bowl. If current market conditions hold, another early start to the domestic season could be on the horizon. Rain has been reported in the Guatemalan growing regions, contributing to ongoing shipping delays that may persist throughout the month. During this time, we may see an increase in pricing on baby squash, peeled baby carrots, French beans, and sugar snap & snow peas.

Christmas is right around the corner and the weather in Yuma is improving! We are finally starting to see some relief from the heat damage we had in Yuma and Salinas. Quality and supplies are improving across the board. Broccoli is still escalated but is no longer at the extreme trigger. Quality and supplies are looking good. Endive, escarole, leeks, cilantro and fennel are still escalated and look to remain that way through the year. Bok Choy, Cauliflower and Artichokes have stayed at the extreme trigger. All of these items are still light in supplies. Growers will be holding on to averages and you may still see some prorates. Spinach is still escalated but will likely be back to normal pricing in 2 weeks. Broccolini is finally seeing some relief and growers should be able to fill orders in full. Some will still be holding to averages but supplies have improved. Green cabbage, Red Cabbage, Celery and Brussel Sprouts are still escalated. Supplies will be limited on all cabbage items, but things are definitely improving. Brussel Sprouts are in higher demand with the holidays and some growers are starting to be tight on supplies. Transition threw us a few curve balls, but we are starting to see relief. As a reminder, some growers are still loading out of Salinas and Oxnard and there will be transfer fees on some items with some growers. Please be aware that you may see some of these fees if you are loading in one location. Some growers have items that do not transfer to Yuma so they will have fees throughout the Yuma season.

### Alert List

- Asparagus – **ESCALATED**
- Artichokes – **EXTREME**
- Avocados – **ESCALATED**
- Bell Pepper (Green) – **ESCALATED**
- Bok Choy – **EXTREME**
- Broccoli, Florets and Crowns – **ESCALATED**
- Brussel Sprouts-**ESCALATED**
- Cabbage-Green – **ESCALATED**
- Cabbage-Red-**ESCALATED**
- Cauliflower –**EXTREME**
- Celery – **ESCALATED**
- Cilantro-**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**
- Limes – **ESCALATED ON SMALL SIZES**
- Melon– Cantaloupe – **WATCHLIST** Honeydew – **ESCALATED**
- Mushrooms – **ESCALATED**
- Napa – **ESCALATED**
- Parsley (Italian & Curly) – **ESCALATED**
- Pickles – **ESCALATED**
- Pineapple – **ESCALATED**
- Spinach –**ESCALATED**
- Strawberries – **ESCALATED**
- **Table Grapes – ESCALATED**
- Tomatoes (Rounds, Romas and Snacking Tomatoes) – **EXTREME**

### Watch List

1. Broccolini
2. Eggplant

3. Ginger

4. Snow Peas & Sugar Snap Peas

5. Soft Squash

**Weather**

**OXNARD, CA**

Thu 12/12	Fri 12/13	Sat 12/14	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19
61°   46°F	63°   48°F	63°   50°F	63°   49°F	65°   48°F	64°   50°F	71°   56°F	72°   54°F
AM Clouds/PM	Partly Cloudy	Cloudy	Partly Cloudy	AM Clouds/PM	Partly Cloudy	Partly Cloudy	Partly Cloudy

**YUMA, AZ**

Thu 12/12	Fri 12/13	Sat 12/14	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19
73°   45°F	70°   47°F	71°   44°F	72°   45°F	72°   43°F	74°   49°F	75°   49°F	75°   47°F
Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Mostly Sunny	Sunny	Sunny

**HERMOSILLO, SONORA**

Thu 12/12	Fri 12/13	Sat 12/14	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19
76°   50°F	80°   50°F	83°   50°F	85°   51°F	85°   50°F	83°   50°F	83°   51°F	85°   51°F
AM Clouds/PM	Partly Cloudy	Sunny	Mostly Sunny	Sunny	Mostly Sunny	Sunny	Mostly Sunny

**JALISCO, NAYARIT**

Thu 12/12	Fri 12/13	Sat 12/14	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19
82°   57°F	83°   57°F	84°   57°F	82°   55°F	80°   55°F	81°   54°F	79°   55°F	81°   56°F
Sunny	Mostly Sunny	Mostly Sunny	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Partly Cloudy









**VIZCAINO, BAJA**

Thu 12/12	Fri 12/13	Sat 12/14	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19
79°   48°F	79°   52°F	83°   51°F	84°   56°F	85°   53°F	84°   51°F	82°   55°F	83°   54°F
AM Clouds/PM	Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Mostly Sunny









**CULICAN, SINALOA**

Thu 12/12	Fri 12/13	Sat 12/14	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19
87°   60°F	91°   56°F	93°   55°F	90°   55°F	87°   55°F	88°   55°F	86°   56°F	89°   56°F
Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Mostly Sunny	Sunny

**QUINCY, FL**

Thu 12/12	Fri 12/13	Sat 12/14	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19
58°   34°F	66°   49°F	69°   54°F	71°   53°F	75°   53°F	77°   51°F	75°   53°F	72°   44°F
							
Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Sunny	Partly Cloudy	Partly Cloudy	Mostly Cloudy

**IMMOKALEE, FL**

Thu 12/12	Fri 12/13	Sat 12/14	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19
70°   55°F	77°   60°F	79°   64°F	80°   65°F	82°   65°F	83°   64°F	82°   63°F	82°   59°F
							
Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy	PM Thunderstorms	PM Thunderstorms	PM Thunderstorms

**Fruits & Vegetables**

**Avocados: ESCALATED** Last week's harvest totaled 57.4M pounds, representing a 5% increase from the previous week. This week's harvest is progressing well, despite downward pressure on field pricing. With the holidays approaching, the availability of additional standing inventory in the U.S. is a positive development, especially as multiple no-harvest days are anticipated toward the end of December. Market conditions remain largely consistent with the previous week, except for 48s, which experienced a decline. The average dry matter content stands at 29.9%.

**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** Supplies remain limited out of all growing areas. Santa Maria continues to see cooler temperatures (upper 50s to mid-60s) and consistent fruit quality. However, defects like green shoulders and button-nosed shapes are becoming more common. Growers prioritized pre-storm harvests to maximize yield, but rain did disrupt some operations and will likely diminish fruit quality, potentially accelerating the season's end. Mexico continues to see mild weather, with highs in the 80s and lows in the 40s. Steady production increases expected through December. Quality remains strong, with occasional green tips and small-to-medium sizes. Organic availability is limited. Florida's cold trends continue, with daytime highs in the low 70s and nighttime lows in the mid-40s. Light showers have had a minimal impact on volumes. Volume is increasing week over week, though the cold front is slowing ripening. Quality continues to improve.

**Blackberries:** Out of Mexico, consistent quality with medium-to-large sizing, good sheen, and firmness. Some issues with red cell regression and soft, leaking fruit. Steady volume expected for the rest of the year, with transfers to Texas maintaining freshness. Watsonville/Salinas production has officially ended for the 2024 season.

**Raspberries:** Out of Mexico, steady volume is expected through November, with strong fruit color, firmness, and size. Crews are addressing occasionally overripe and crumbled fruit. Transfers to Texas will ensure peak freshness. Watsonville/Salinas production has officially ended for the 2024 season.

**Blueberries:** Out of Mexico, volume and quality are improving, with peak production lasting through December. Minor issues include shriveling and leaking fruit. Out of Peru, harvest is past its peak. Bulk and pre-packed shipments (6oz, pints, and 18oz) will continue weekly through year-end. Quality remains high. Organic options will become available in December. Out of Chile, the northern regions are seeing a decline in volume, but exports will remain steady into December. The quality is excellent, with large sizes, good firmness, and sweet flavor. Arrivals are expected weekly in December, with peak volume in January.

**Citrus**

**Oranges:** There is some rain in the Orange growing areas of California which will slightly delay harvesting but should not affect overall supplies. Quality on Navels from California is very good with sizing still running heavy to 88s, 113s and 138s. 72's and larger continue to be in lighter supply although availability of larger sizes continues to improve,

**Lemons:** Lemon supplies are plentiful with very good quality out of the desert growing regions. District 1 and District 2 Lemons have also started with very good quality as well.

**Limes: ESCALATED ON SMALL SIZES—** Market is steady to slightly stronger, especially on small sizes with very good quality. Expect to see higher pricing in the coming weeks.

**Imports/Specialties:** California Mandarins have started with very good quality. Grapefruit has started in the Desert growing regions of California with District 1 starting in a small way, supplies continue to improve. Quality is good. Cara Cara volume is increasing with promotable volume through December. Blood Oranges have started with very light supplies

### **West Coast Lettuce**

**Iceberg:** Lettuce supplies and quality are improving. Weights are better but are still slightly lower than normal. Yields are improving as the weather warms up in Yuma.

**Iceberg VA:** Quality and supplies are improving. You may still see some growers holding to averages but the market is starting to even out.

**Romaine, & Romaine Hearts:** Romaine and Romaine heart supplies have improved. We are still seeing light weights and some growers holding to averages. The Romaine Hearts market is still escalated with some growers.

**Romaine VA:** Quality is fair, and supplies are still very tight. You will likely see growers holding to averages.

**Green Leaf and Red Leaf:** Overall quality and supplies look good. Weights and sizing are still light, but the weather is improving so weights and supplies will get better soon.

### **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 as we completely transition to Nogales. Quality is mostly good.

**Color Bell Pepper:** Markets were better this week as more volume was available on red and yellow pepper from Mexico as well as the desert. Quality being packed is mostly good.

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

**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 the weather.

**Eggplant: WATCHLIST** Tighter supply from all domestic growing regions keeps upward pressure on price; stable crossings in Nogales and McAllen. Quality is good.

**Slicer Cucumbers:** Good supply crossing through Nogales and McAllen. Domestically, we may see some supply GAPS this week due to cold weather in Florida. The best quality is coming from Mexico.

**English Cucumbers:** Good supply available this week crossing from Mexico. 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 levels are steadily improving; however, quality remains moderate. The supply of conventional French beans from Mexico is currently limited due to adverse weather conditions.

**Zucchini/Yellow Squash: WATCHLIST** Supply is good crossing through Nogales; Florida is struggling and should for the next ten days due to limited supply as cooler weather has slowed down production. Best quality is loading in Nogales.

**Herbs**

Basil quality is showing continuous improvement. However, the supply of imported chervil remains low due to weather challenges. Additionally, the production of chives and sage is being impacted by cold weather conditions 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**

Both cantaloupes and honeydews reached “demand exceeds supply” levels due to the effects that followed Tropical Storm Sara almost four weeks ago. Although we have experienced lower yields on both commodities, to date we have fared much better on the cantaloupe than the honeydew. We began advising three weeks ago of a potential volatile December and that has definitely come to fruition with the honeydews

**Cantaloupe: WATCHLIST** Quality is very nice on the fruit arriving from Guatemala; sizing is primarily 9s followed by 12s and 9Js while brix levels have been mostly in the 12-16% ranges with some higher. Demand is strong right now and is expected to remain high through January as the rain from Tropical Storm Sara has impacted fields in Honduras and Costa Rica which were scheduled to begin harvesting in four weeks. Shippers with fruit from those regions are already advising customers that no promotional pricing will be provided over the next 2-3 months as there is concern with bacteria in fields negatively impacting yields. We will continue to monitor this situation and provide further input on future updates, but we are expecting higher markets to remain in place both in the short and long term.

**Honeydew: ESCALATED** With really no Mexican crossings over the past week, all of North America has turned its attention to Guatemala which is currently the only source in all of Central America. With yields being down 30 – 50% (depending on field location and the amount of rain received) following TS Sara, there just has not been enough production to satisfy the industry. Last week's harvest was so limited we expect no arrivals between Monday and Thursday this week with limited availability on this week's vessel. We will continue to ask for flexibility in sizing and subs where necessary to maintain service levels as we are unclear as to when supply will improve at this point in the season.

**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 throughout the year. The market is still at the extreme trigger. Growers are holding to averages. Quality is good.

**Asparagus: ESCALATED** Southern/Northern Baja production is still low due to seasonality. Northern Sonora (Caborca) should start next week, but volume will be very low because of the weather. Peruvian volume has started to decrease due to quality and seasonality. Markets are less active this week but expected to improve next week.

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

**Broccoli/Broccoli Crowns: ESCALATED** Quality and supplies are improving. Supplies are going to be limited for most growers for at least a few more weeks. It was cold in the mornings in Yuma and that was not helping the broccoli grow but the weather is improving so the supplies are getting better. This has come off of the extreme trigger and looks like it will be seeing some relief in the next 2 weeks.

**Brocolini and Sweet Baby Broccoli: WATCHLIST** Quality is good, but supplies are light with some growers. Expect this item to be an issue throughout the year. Demand is very strong, and supplies continue to be limited but growers are starting to be able to fill full orders. They are just still holding to averages.

**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 remain tight, and quality is just okay. Yuma has still not been able to get caught up on supplies. Some growers are holding to weekly averages. The weather in Yuma is starting to improve but it will be a few weeks before we see some relief on this item.

**Celery: ESCALATED:** Quality is good supplies are okay. Growers are able to cover contract business. There are some heat issues and insect pressures. Supplies are tight and will continue to be that way into Christmas.

**Corn: EXTREME** Current supply is extremely tight and expected to continue through New Years. In the East the primary regions where production is taking place were damaged by Hurricane Milton and seeing very low yields and heavy crop damage. We anticipate volatile markets through the end of the year. Also want to note that corn will be smaller this time of year as well due to less sun which typically slows the growth of the ears and produces smaller kernels. In the West, supply has also tightened up as the desert winds down and Mexico is the primary growing region. Quality out of the west was good.

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

**KALE:** Supplies have improved, and 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:** California Garlic is showing very good quality with good demand.

**Ginger:** Supplies and market are steady

**Green Cabbage: ESCALATED** Supplies and quality are improving. The market is still escalated but it should start to level out soon.

**Green Onions:** Supplies and quality look good

**Mushrooms: ESCALATED** Supply will remain snug through the end of the year. Quality is good.

**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: ESCALATED-** Pricing is escalated. Quality is good but supplies are tight. Light supplies are expected for at least the next 2 weeks. The market remains very active.

**Spinach: ESCALATED** Supplies are improving. Some growers are still holding to weekly averages, but the market is starting to level out. Relief should be coming soon on this item.

**Snow Peas and Sugar Snaps: ESCALATED** The domestic supply of snow peas and sugar snap peas remains extremely limited, while Mexican production continues to be impacted by adverse weather. However, Guatemalan snow pea production has improved this week and is expected to show further improvement next week. Sugar snap pea production remains low due to weather conditions, and 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** We continue to see shortfalls in supply however there is light at the end of this tunnel. We expect to see a slow improvement in production after Christmas as we recover from Hurricane Milton. We still expect volume out of the region to be at 20% or less of the normal levels over the next week then slowly improve. We are hoping by Jan 1 to see a much more stable domestic tomato production outlook.

#### **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** Improving volume crossing through Nogales this week; volume was lighter out of Otag and McAllen as the motion has been set for the Winter transition. There is some fruit out there that is questionable, and deals being

made for that supply. Stronger fruit is pulling a premium. Markets will be active through next week as demand remains strong out of the east. Quality is mixed.

- **Grape Tomatoes: EXTREME-** High Demand and short supply expected to keep prices well above normal through the holiday season. A lot of this is due to limited supply on the east coast and transition in the west. Quality is good.
- **Cherry Tomatoes and Medley Tomatoes:** Supply is tighter, and markets are firming up. Quality is good.
- **Tomato on the Vine:** Steady volume available this week.

#### **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.