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Wed 11/1 95° 70°F  Mostly Sunny	Thu 11/2 95° 69°F  Partly Cloudy	Fri 11/3 95° 68°F  Partly Cloudy	Sat 11/4 94° 66°F  Partly Cloudy	Sun 11/5 95° 66°F  Sunny	Mon 11/6 94° 65°F  Sunny	Tue 11/7 94° 66°F  Sunny	Wed 11/8 90° 66°F  Partly Cloudy	Thu 11/9 89° 67°F  Partly Cloudy
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JALISCO, NAYARIT

Wed 11/1 82° 62°F  Mostly Sunny	Thu 11/2 82° 61°F  Partly Cloudy	Fri 11/3 84° 62°F  Partly Cloudy	Sat 11/4 85° 64°F  Partly Cloudy	Sun 11/5 84° 63°F  Partly Cloudy	Mon 11/6 83° 60°F  Sunny	Tue 11/7 83° 60°F  Mostly Sunny	Wed 11/8 81° 59°F  Partly Cloudy	Thu 11/9 81° 62°F  Partly Cloudy
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VIZCAINO, BAJA SUR

Wed 11/1 92° 60°F  Partly Cloudy	Thu 11/2 94° 61°F  Sunny	Fri 11/3 93° 60°F  Sunny	Sat 11/4 91° 59°F  Sunny	Sun 11/5 90° 59°F  Sunny	Mon 11/6 89° 61°F  Sunny	Tue 11/7 90° 62°F  Sunny	Wed 11/8 89° 61°F  Sunny	Thu 11/9 90° 61°F  Mostly Sunny
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ADEL, GA

Wed 11/1 60° 37°F  Sunny	Thu 11/2 65° 44°F  Mostly Sunny	Fri 11/3 70° 50°F  Mostly Sunny	Sat 11/4 76° 55°F  Mostly Sunny	Sun 11/5 79° 57°F  Partly Cloudy	Mon 11/6 81° 61°F  Partly Cloudy	Tue 11/7 82° 52°F  Partly Cloudy	Wed 11/8 72° 50°F  Sunny	Thu 11/9 73° 51°F  Partly Cloudy
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RUSKIN, FL

Wed 11/1 75° 54°F  Sunny	Thu 11/2 80° 61°F  Sunny	Fri 11/3 82° 64°F  Mostly Sunny	Sat 11/4 85° 68°F  Partly Cloudy	Sun 11/5 86° 67°F  Partly Cloudy	Mon 11/6 87° 69°F  Mostly Cloudy	Tue 11/7 84° 67°F  Partly Cloudy	Wed 11/8 81° 61°F  Partly Cloudy	Thu 11/9 81° 61°F  Mostly Sunny
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Fruits & Vegetables

Avocados: ESCALATED Last week, the industry had a big harvest with 63.9M pounds—a strong recovery from the low of 37M pounds two weeks ago. Mexico accounted for 99% of the avocado volumes in the U.S. With cooler weather in many parts of the U.S. and fall produce items prominently in the supermarkets, U.S. avocado market sales were down slightly last week compared to the week prior and were around 41 million pounds. Current U.S. inventory is around 52M pounds. Harvest continues strong this week in Mexico. There will be no Avocado production in Mexico this Thursday due to the Day of the Dead, although with strong daily harvest volume to start this week and solid inventory in the U.S. market, it is likely that skipping a day of harvest/packing will be inconsequential to the U.S. market. The next no-pick/pack holiday in Mexico will be November 20th (Revolution Day). Growers will begin moving into higher elevations, and harvesting new acreage for the season is providing more volume in 48s and a bit of an increase in 40s and larger.

Bananas: Steady volume expected through Q4 and quality to be good.

Pineapples: Volume improving out of Costa Rica and quality remains good.

Table Grapes: EXTREME We expect the California season to wrap up in approximately 3 weeks; fortunately, we are starting to see Peruvian fruit at the ports and expect to see high demand and very high pricing. With the Peruvian volume down and the front end of the Chilean forecast down, markets are expected to remain very active through January. We still recommend scaling back portions and consider sub to other options such as diced apples, or mixed melon chunks during that estimated timeline if needed. California quality will be hit and miss while the offshore fruit looks good.

Berries

Strawberries: In terms of fruit quality, it remains generally good with a healthy sheen and vibrant coloring ranging from 90-100 percent. However, misshapen fruit is still prevalent across the field. Overall, there have been gradual improvements each week, although challenges persist. The harvest crews are still encountering issues, dropping a significant amount of fruit, mostly small, with some being overripe, soft, crooked, and albino. The fruit in the pack appears good, but there are instances of pin rot and minor bruising. Additionally, the fruit becomes damp on foggy mornings, and the skin is delicate, leading to bruising issues. Florida growers are on track to scratch in the middle to end of November.

Blackberries: Weather conditions have posed significant hurdles for growers in Ziracuaretiro. Last weekend's rains and limited sunny days have made it challenging for growers, especially those who are not covered, impacting their harvesting efforts. Growers' upcoming numbers are contingent on the weather, and we anticipate an increase in productivity in mid-November.

Raspberries: Currently, the primary challenge revolves around unpredictable weather conditions. Mexico saw rainfall in the growing regions, which lowered overall production. Growers had to revise our estimations for the upcoming weeks due to the impact on several growers. Moreover, some growers are in the midst of pruning. Looking ahead, we anticipate harvesting from replanted areas in the coming weeks.

Blueberries: Extreme Early weather in the Peruvian season negatively affected crops and subsequent production. Yields are less than 50% from areas, and some crops were utterly wiped out. The El Niño phenomenon brought both extreme heat and windy, wet weather. Supplies out of Peru are expected to improve mid-November but tail off quickly in December. Supplies remain very light out of Mexico, and crops are behind 3-4 weeks. Furthermore, growers saw tropical weather last week that decreased estimates by 30-50%. The markets are not expected to be wholly corrected until Chilean arrivals begin to enter the U.S. in late December or early January.

California Citrus

Oranges: Navels have started out of Calif in a very light way, but we should see supplies slowly increasing as we head through November. Valencia season is almost finished, and small fruit is expected to remain extremely tight through the end of the valencia season. Small fruit (88's and smaller) continue to be in a demand exceeds supply situation. There are going to be Florida oranges available, quality is looking good.

Lemons: WATCHLIST Demand is high on Fancy grade and small sizes will continue to be extremely tight. Expect light supplies through the month of October until D3 gets into full production. Please be sure and book orders early!!

Limes: ESCALATED Demand continues lighter, causing weakness in the market with lower prices, especially on small sizes. Most shippers are still receiving primarily small fruit, so we are still seeing a significant difference in the pricing between small and large sizes as large sizes remain demand exceeds supply with many shippers. We expect the market to be steady to slightly lower next week but will see market firm back up when the holiday approaches. Expect lighter supplies to continue on large sizes through Q4.

Grapefruit: Star Ruby Grapefruit is being packed in Riverside and the central valley. Currently peaking in a 56/48/40.

Imports/Specialties: Imported mandarins on both the east and west coasts.

West Coast Lettuce

Iceberg: Lettuce supplies continue steady, loading out of both Salinas and Huron. We will see a handful of shippers starting out of Yuma next week with most fully transitioned the week of Nov 13th. We continue to see a few heat related issues from the hot weather in California last week, but overall quality looks good.

Romaine, Romaine Hearts: Romaine and romaine hearts are still shipping from the Salinas Valley and Huron with a few shippers starting in Yuma over the weekend and into next week. Supplies remain steady with good quality, but we are still getting reports of some light to moderate tip-burn, but overall quality is good on both carton romaine and romaine hearts.

Green Leaf, Red Leaf & Butter: Expect to see a few heat related issues as we finish out the season in Salinas but overall good quality and supplies out of Salinas are good. We will see a few shippers starting in Yuma next week with most shippers fully transitioned the week of Nov 13th. Expect market to remain steady through next week.

Eastern and Western Vegetables

Green Bell Pepper: Light volume out of California this week as the season starts to wrap up along the coast. In the local deals are done and South Georgia is seeing very good demand pushing prices higher this week. We should see some green pepper crossing through Nogales as well as out of Coachella over the next three weeks. Overall, the quality is good.

Red Bell Pepper: Excellent quality and volume available out of California as our growers are into newer blocks of fall pepper.

Yellow Bell Pepper: Excellent quality and volume available out of California as our growers are into newer blocks of fall pepper.

Orange Bell Pepper: Markets are steady. Quality remains strong.

Mini Sweet Pepper: Excellent supply this week loading in Oxnard.

Mixed Chili Pepper: EXTREME In the east, the hot pepper market is hit or miss out of South Georgia on the mainland of Mexico, we are seeing very light volume continue; Serrano, Poblano, and Habanero seem the shortest. There is some volume out of Baja which seems to be improving post-Hilary. California production remains hit or miss at this time. Tomatillo will firm up and quality will be fair at best on all varieties.

Eggplant: Overall quality is good, and markets have firmed up due to limited supply in the west. South Georgia is producing the most volume and we are seeing a few cross in Nogales this week but expect high markets for two weeks.

Slicer Cucumbers: Good volume available out of South Georgia and Mexico crossing through McAllen and Nogales. Quality is very good.

English Cucumbers: Markets are easing back as we see more volume crossing from Mexico. Canada is winding down. We should see availability improve over the next few weeks.

Pickles: New crop available out of Florida this week and seeing a few more cross in Nogales and quality is good.

Green Beans: ESCALATED Markets are very strong, and supply is limited out of South Georgia. There are some local beans available by region, however a wide range of quality will be present. This is expected to improve over the next few weeks as we prepare for Thanksgiving.

French Beans: WATCHLIST Quality and supply continues to improve from Guatemala. Light supply and fair quality of conventional out of Mexico.

Zucchini/Yellow Squash: Good supply available out of South Georgia; local deals are mostly done for the season. Steady volume crossing in McAllen and Nogales and quality is good.

Herbs

Growers were getting ready to harvest this week to kick off the winter season, but this will be delayed about 5-7 days. Fortunately, supplies are in three other growing regions, so supplies will be limited, but there will be supplies.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	MEXICO
Opal Basil	Steady	Steady	USA/MEXICO
Thai Basil	Steady	Steady	MEXICO
Bay Leaves	Steady	Steady	COLOMBIA
Chervil	Limited	Marginal	USA
Chives	Steady	Steady	MEXICO
Cilantro	Steady	Steady	USA
Dill	Steady	Steady	USA
Epazote	Steady	Steady	MEXICO
Lemongrass	Steady	Steady	USA
Marjoram	Limited	Flowering	MEXICO
Mint	Steady	Steady	USA
Oregano	Limited	Flowering	MEXICO
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	MEXICO
Sage	Steady	Steady	MEXICO
Savory	Steady	Steady	USA

Sorrel	Limited	Steady	USA
Tarragon	Limited	Steady	MEXICO
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

Melons

We will have fruit available in Yuma as well as Florida at the end of the week and with the wide variances in size we ask to be flexible on sizing to maintain service level until we settle into a steady supply of the offshore fruit.

Cantaloupe: Cantaloupe production is yielding smaller fruit with above average temperatures over the past few weeks and virus pressure its impacting yields. Sizing continues to be on the smaller scale. Being flexible on sizing will be necessary. On the offshore fruit we expect to be heavy to 9's and good brix levels being reports ranging 13-16%

Honeydew: Honeydew supplies remain tight this week out of Yuma but seeing better crossings in Nogales Markets were strong on all sizes with the bulk of the availability in Yuma sizing is good on 6-8's. External quality has been good except for a few scars. Internal quality is providing brix levels in the 10-13% range.

Watermelon: Overall quality is good out of Mexico.

Mixed Vegetables

Artichokes: WATCHLIST Overall supply has declined with the increased demand heading into the holidays, market is stronger with very good demand.

Arugula: Supplies are good with good quality

Asparagus: ESCALATED Asparagus continues to be limited in all growing regions. Most of the production in Mexico is in southern Baja right now. Northern Baja has started to close fields due to seasonality, and the Sonora Desert has started opening fields in higher elevations. Peru is still at 50% of their normal volume for this season due to El Niño, and volume will not increase until the north starts opening fields in about 2 weeks. Markets are very active with less volume available from Mexico.

Bok Choy: Supplies are increasing with very good quality.

Broccoli/Broccoli Crowns: Lighter supplies on broccoli crowns and bunched broccoli next week as we head into transition as Salinas winds down for the season. Expect the market to firm up as we move through transition and holiday demand picks up.

Brocolini: WATCHLIST Brocolini supplies are light with brown beads and flowering effecting quality. Supplies continue light, although we have not seen the heavy pro-rates we have seen over the last few weeks.

Brussels Sprouts: ESCALATED We are seeing steady supplies, and most shippers will be covering averages. Sizing is heavier to medium and small, large sizes remain short. Market remains strong although we should see pricing start to settle over the next few weeks although demand will increase significantly as we head into the holidays.

Carrots: (JUMBOS, MEDIUMS and CELLOS) EXTREME Very limited supply on Jumbo and Medium Carrots in California and growers are in a demand exceeds supply situation. Fields in the Salinas and Bakersfield region are not sizing up. Expect Jumbo carrots to remain in light supply, well into Q1, 2024.

Cauliflower: We will have steady volumes into next week but look for the market to start trending higher as we enter the Thanksgiving Holiday pull. Yuma will start harvesting slightly later than most other items as some shippers will not be starting to harvest until the week of 11/20. Overall quality looks good.

Celery: WATCHLIST Steady supplies with very good quality. Market is starting to trend higher as the demand increases for the holiday pull. A few shippers have started shipping from Oxnard with more getting started over the next few weeks.

Cilantro: Cilantro supplies, and quality are improving.

Corn: WATCHLIST We are seeing an uptick in pricing as supply in the west is limited with light supply available out of Coachella. In the east, most local deals are done, and we have transitioned to South Georgia. Quality is good.

Fennel: WATCHLIST Current supplies are light, quality is good. Expect supplies to remain light into next week.

Garlic: The 2023-2024 California Garlic season has started. Quality is looking good.

Ginger: Supplies and market are steady

Green Cabbage: Supplies are steady with very good quality. Demand is good.

Green Onions: Good supplies with very good quality. As we get into the holiday season, expect some volatility in the market as labor becomes hard to find with workers heading home for the holidays.

Mushrooms: ESCALATED Quality is good, and supply is volatile as growers scaled back some of their production due to lack of demand in recent weeks. We are seeing very short markets on white and cremini mushrooms. We expect the seasonal volatility to further increase as Thanksgiving demand will increase at retail over the next few weeks. Markets will most likely remain volatile through December.

Napa Cabbage: Supplies and quality are improving.

Parsley (Curly, Italian): Supplies and quality are improving.

Rapini: Good supplies with very good quality.

Red Cabbage: Supplies are steady with good quality. Demand is good.

Spinach (Bunched & Baby): Good supplies and good quality.

Spring Mix: Supplies are good with very good quality.

Snow Peas and Sugar Snaps: ESCALATED Guatemalan quality and production of both peas continues to improve. Snow pea and sugar snap supply is improving out of Mexico with good quality.

Onions

The market appears to have settled out in Northwest. While California is down to only a few shippers, they are still showing a presence on the USDA Market Report. For the most part, everything is coming out of the Northwest. White onions remain in tight supply and their elevated price is reflective of that. We are seeing much better size on yellows in the Northwest as well, with Colossal and Super Colossal sizes being in good supply. To the surprise of many, the market has remained relatively stagnant across the board on all colors and sizes. It was expected to come down fast with the typical tidal wave of new supply entering the market all at once. This season, there has been enough rain delay during harvest that has made the volume much more manageable from a shipping standpoint. It is believed that next week growers will hit their harvest stride and supply could become much more plentiful in both Idaho/Oregon and in Washington. Barring any unexpected weather setbacks, there are no major headwinds expected in this year's Pacific Northwest onion crop. Truck rates continue to increase back to more healthy rates as well and should continue to remain firm or increase as we move into Q4.

Potatoes: ESCALATED

We are beginning to see some stability in the market at the current price levels. Even though potatoes have not been through the sweat yet, and cannot be stored, there is not much room left for the market to fall. Growers will likely have the luxury of being able to turn down prices if they are too low and focus on storing. We are seeing Washington's early potatoes sizing on the larger range – so 40ct through 70ct have been plentiful, and there have been a lot of straight load deals. In Idaho, tuber counts are high, which tells us that yields are strong. The unknown there will be how the crop is sizing overall. Due to the high levels of heat, they have experienced over the last several weeks, it is possible we see smaller potatoes more plentiful this season. The outlook remains optimistic this season on yields, sizing, and quality. Barring any unforeseen weather events that would negatively impact harvest or storage, the industry should be in for some much-needed relief on fresh potatoes this season. Truck rates continue to increase back to more healthy rates as well and should continue to remain firm or increase as we move into Q4.

Tomato Update

We are getting close to the end of the year which means typical seasonal challenges in the tomato category. This time of year, as it gets colder and local production comes to an end, the country leans on Mexico and the smaller transition crop out of North Florida until we settle in South Florida for the winter. We expect to see lighter volume this year out of Mexico due to the impacts of rain events over the past month which have depleted quality and volume. We do expect to see our contracts perform but at escalated pricing; we expect to maintain service level however, we need to be proactive as much as we can by placing orders well in advance and be prepared to see some color challenges due to lighter volume and quicker turnover of inventory at shipping point.

A few things to note over the next 2 months.

- There will be a later than normal start to the Sinaloa season due to the recent hurricane that impacted the growing regions which could impact the overall tomato supply should Florida not have the ability to support the imbalance.

- We expect relief the first of December, but as late as Mid-January due to the rain events in Mexico causing damage and delays.
- We do not anticipate the need to sub and expect volume to be snug.

Tomatoes: East Coast

- **Round and Roma Tomatoes: ESCALATED** Volume is extremely light, and prices are escalated. With the local deals done and very limited supply still out of Florida, demand is far outpacing the supply available. We started to see some new crop production out of South Georgia and Quincy, FL. Overall quality is good, and we expect to be in South Florida over the next week however expect volatile markets through the middle of January.
- **Grape and Cherry Tomatoes: ESCALATED** Grape tomato supply will be short this week, FOB prices will continue to escalate this week. We may see lighter markets for the next two to three weeks.

Tomatoes: Mexico

- **Round and Roma Tomatoes: ESCALATED** Markets firmed up this week as fruit gets tighter from the seasonal decline, as weather cools and the impacts of Hurricane Normal to Sinaloa growers supply cannot keep up with demand. Overall quality is fair, and prices have increased significantly.
- **Grape and Cherry Tomatoes: ESCALATED** Lighter supply and increased demand from the east has pushed pricing higher this week on volume crossing through McAllen, Nogales and Otay. Overall quality is good off the mainland crossing in McAllen while still hit and miss in Otay from the Baja. We could see stronger markets for the next 2-3 weeks.
- **Medley Grape Tomatoes:** Lighter volume this week with fair quality.
- **Tomato on the Vine:** Stable supply was this week and quality is good.
- **California Tomatoes:** Done for the season.

APPLES

Apples: We will see excellent availability now through the new year on apples as growers continue harvesting the new crop. Apple supplies are anticipated to be 30% higher than last year. Growers are seeing higher percentages of extra fancy and premium apples.

Pears: We will see excellent availability now through the new year on pears as growers continue harvesting the new crop. Unfortunately, pear supplies are expected to be slightly lower than last year but will be plentiful through Q4.

Other Fruit

Pomegranates: Early Granada varieties available in the west.

Persimmons: Fuyu and Hachiya varieties available.