



# Weekly Market Review

## August 8, 2024

### Overview

Tropical Storm Debby has caused major damage to the agriculture industry up the eastern seaboard that could impact the local summer programs. Items that could be impacted are local corn, bell peppers, hot pepper squash, cucumber, stone fruit, berries and fall items such as sweet potatoes and pumpkins. We are assessing this with our growers currently but still tracking the storm as it moves Northeast up the seaboard. Tomato markets are extremely short, particularly on rounds and Mexico does not have enough to supply the nation's demand. The west, the heat will be exposed to table grapes, corn, bell pepper, stone fruit, soft squash, beans and eggplant and we will need to watch this closely as it could dictate the direction of several markets for weeks. Currently the table grape supply out of California is strong as is demand. Limes are getting short, and Mexico has adjusted harvesting due to the quality of the older crops while waiting for new crop to ramp up. Fruit will be lighter in color, and we will see size distribution lean heavier to mid-range or larger, small fruit will be short. The avocado market is experiencing ongoing volatility, which is anticipated to continue throughout the summer months. Mexico is struggling to manage the transition between Old Crop and Loca, leading to significant fluctuations in weekly availability and sizing profiles. The onset of the rainy season has introduced a combination of delays and potential benefits; however, this has not resulted in a surge in demand. Consequently, there is an unexpected necessity to source fruit directly from the fields, causing prices to increase as demand surpasses supply. Weekly fluctuations, both upward and downward, are expected as all current Chief Operating Officers adjust their availability. The weather in Salinas is still much warmer than normal for this time of year and impacting the Salinas growing region. Growers are still doing all they can to combat any heat damage, but the markets are going to vary from week to week. Brussels sprouts continue to have a few quality and supply issues, but things are improving, and we should see some relief in the next week or 2. Endive, escarole, leeks, cilantro and fennel are still escalated and will stay that way until we see relief on those supply issues.

### Alert

- Asparagus – **ESCALATED**
- Artichokes -**ESCALATED**
- Avocados – **EXTREME**
- Bell Pepper (All Colors) - **EXTREME**
- Bok Choy – **ESCALATED**
- Broccoli Florets and Crowns – **ESCALATED**
- Brussel Sprouts-**ESCALATED**
- Cabbage, Red - **ESCALATED**
- Cilantro- **ESCALATED**
- Corn- **ESCALATED**
- Endive & Escarole-**ESCALATED**
- Fennel, Anise – **ESCALATED**
- Green Beans – **ESCALATED**
- Hot Peppers (Habanero and Red Fresno) - **EXTREME**
- Leeks-**ESCALATED**
- Napa – **ESCALATED**
- Lemons – **EXTREME ON SMALL SIZES**
- Parsley (Curly & Italian) - **ESCALATED**
- Snow Peas – **ESCALATED**
- Tomatoes (Rounds and Grapes)- **EXTREME**
- Tomatoes (Roma)- **ESCALATED**

### Watch List

- French Beans
- Ginger
- Green Onions
- Cauliflower
- Lettuce, Boston/Butter Lettuce, Better Burger
- Lettuce Iceberg Liner
- Lettuce Romaine and VA Blends
- Lettuce Green Leaf and Red Leaf
- Limes
- Oranges
- Spinach

### Weather









#### SALINAS, CA

Thu 8/8	Fri 8/9	Sat 8/10	Sun 8/11	Mon 8/12	Tue 8/13	Wed 8/14	Thu 8/15
68°   54°F	69°   53°F	70°   54°F	68°   54°F	66°   53°F	68°   54°F	69°   53°F	66°   53°F









#### OXNARD, CA

Thu 8/8	Fri 8/9	Sat 8/10	Sun 8/11	Mon 8/12	Tue 8/13	Wed 8/14	Thu 8/15
70°   60°F	71°   60°F	73°   61°F	74°   61°F	73°   60°F	72°   60°F	73°   60°F	73°   59°F









## BAKERSFIELD, CA

Thu 8/8	Fri 8/9	Sat 8/10	Sun 8/11	Mon 8/12	Tue 8/13	Wed 8/14	Thu 8/15
106°   75°F	105°   75°F	105°   76°F	104°   74°F	100°   72°F	98°   70°F	97°   69°F	98°   70°F
							
Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny	Sunny

## JALISCO, NAYARIT

Thu 8/8	Fri 8/9	Sat 8/10	Sun 8/11	Mon 8/12	Tue 8/13	Wed 8/14	Thu 8/15
81°   67°F	82°   65°F	81°   66°F	77°   65°F	78°   65°F	80°   65°F	80°   65°F	79°   65°F
							
Scattered Thunderstorms	Scattered Thunderstorms	Scattered Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Scattered Thunderstorms	Thunderstorms

## HENDERSONVILLE, NC

Thu 8/8	Fri 8/9	Sat 8/10	Sun 8/11	Mon 8/12	Tue 8/13	Wed 8/14	Thu 8/15
77°   69°F	86°   67°F	87°   65°F	85°   64°F	82°   65°F	82°   65°F	81°   64°F	81°   64°F
							
PM Showers	Partly Cloudy	Mostly Sunny	PM Showers	PM Showers	Scattered Thunderstorms	Showers	Scattered Thunderstorms

## Fruits & Vegetables

**Avocados: EXTREME** Overall volumes are down another 10% vs. last week, with the weekly total closing at 50.8M pounds for the US. This week, Mexico had limited Loca orchards available due to higher dry matter requirements, and next week, it is likely to be similar. The restricted volume of new crop combined with Old Crop/Negra winding down resulted in an unexpected and drastic spike in field pricing for harvest opening this week. The market was strengthening last week, but the drastic jump caught most off-guard. Last week's arrivals from Peru were down 3%; while that isn't a significant adjustment, it is a signal that Peru's peak arrivals have passed. While some of the fruit has sized up, there's no change to total volume projections, and the season is expected to be mostly wrapped in late August. California has surpassed 270M pounds for the season, and a few strong weeks of harvest remain. Volumes will continue to be available through August, and we expect the season to begin wrapping up in September. The season should easily surpass 300M pounds, more than the previous three seasons.

**Bananas:** Steady supply and quality remain good across the country.

**Pineapples:** Supply was lighter this week and quality remains good. Sizing is going to be a challenge over the next few weeks and may need to be flexible on sizing as 5-6 ct fruit is very short with 7-8's plentiful. The need to be flexible on sizing may be necessary.

**Table Grapes:** Excellent supply will be available out of California this week. Quality out of California is mostly good as the crops are taking the heat wave better than expected.

## Berries

**Strawberries:** Temperatures were slightly warmer this week. Production is still strong but will continue its gradual downtrend. Growers continue to see increased instances of darker, soft, and overripe fruit due to consistently higher temperatures as the summer progresses. Growers see good sheen, medium size, strong red color, and good flavor, but all growers see soft fruit, bruising, mildew, and overripe fruit. The fall crop harvest is expected to begin sometime between late August and September. So far, fall crop plants are looking good, and nice, green, uniform fruit is starting to bud.

**Blackberries:** The quality is decent, with sizing between the medium and large ranges, a good sheen, primarily black, and good firmness. Due to high temperatures in the regions, we see some regression in some ranches and some soft, leaking fruit as the days continue to be hot. Rain has caused some concern for instances of mildew. Blackberries' volume has passed its peak and will steadily decline throughout August until we pick back up in late September. Watsonville blackberries look great, have medium-to-large sizing, and have the most flavor. The attached calyx still seems to be a minor occurrence, and we are seeing some issues with smaller fruits that tend to be tart. Overall, production is increasing steadily week-over-week, and there is an expectation of a peak in production around late August until late September.

**Raspberries:** Rainy season is here, and rain has been coming down every day. The weather has been hot, wet, and humid, with temps in the low 80s and nights in the mid-60s. Overall, the fruit looks decent with a strong red color, with some fruit lighter in color in the pack due to picking a bit early ahead of the heat. Growers are fighting rain and heat to ensure quality packs. Sizes are mostly medium, with larger berries here and there. We do see some overripe, crumbled fruit and mildew from the high moisture environment from the rainy season, but crews are doing their best to keep them out of the packs. The volume of raspberries has passed its peak and will steadily decline throughout August until we pick back up in September. Watsonville Raspberries have passed their peak and will continue a downward trend for the season. We expect a bit of a gap between September and October as we transition into Fall Crop. Overall, the color is a nice dark red color due to the warm temperatures underneath the hoops, and the sizing of raspberries is a good medium size on average.

**Blueberries:** We are seeing some issues of shriveling, scarring, and deformities. Overall, the blueberries' color, size, and flavor are decent. Production is trending to a yearly low due to the high heat. Conventional-wise, volume is expected to be very low through July, then ramping back up towards September. Organic-wise, volume has begun tapering off and will have low amounts of small, steady volume through the next few months. Oregon is expecting some high heat in the 90s this week and is doing its best to get packs in early. Oregon has continued producing strong volume and quality this week, and fruit is looking excellent while meeting estimates. We are seeing issues of mold and smashed berries in packs here and there. Organic production is beginning to enter a peak and will have good production through September. Washington organics production has been going well, and we are seeing strong fruit in this region. Conventional fruit has also been solid, and we expect availability throughout August and quickly drop right after. Organic production is wrapping up, and we will have the last of this season's fruit through next week. British Columbia production has been going strong, and we have reached peak volume in a few varieties. Volume is expected to stay strong and plentiful through late September—only conventional fruit from here. Quality looks great: great taste, bite, and flavor.

## **Citrus**

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**Oranges: WATCHLIST** The California Valencia orange crop has experienced challenges to quality from high thrip pressure during the growing period. Thrip is a small insect that damages the exterior of the fruit in the early growing cycle. This thrip pressure was caused from the rainy conditions early in the year during the growing period, causing an excessive scarring appearance with a high percentage of fruit not suitable for shipping. In addition, the recent heatwave caused some fruit to drop to the ground which will not be harvestable. Due to these conditions, many growers/shippers are reporting lighter than normal supplies for the balance of the California Valencia season. Most shippers have curtailed harvesting, covering regular business only, but will not have additional supplies. Even with curtailed harvesting, some growers see a potential "GAP" in production between the end of the Valencia season and the beginning of the Navel season, possibly up to 2 to 3 weeks. Import Navels are available.

**Lemons: EXTREME ON SMALL SIZES** We continue to see small Lemons in California exceptionally short with no relief in sight until District 3 fruit gets started late in the summer. Import Lemons are arriving with small fruit available. Supplies on Lemons from Mexico continue to be very light as drought conditions have affected available fruit to pick. Flexibility on sizing and loading areas will be mandatory to get orders filled on orders loading in California!

**Limes: WATCHLIST** The market remains volatile due to declining yields on export quality fruit as we approach the end of the current growing cycle. We are seeing lighter color fruit and a shift in sizing heavy to mid-range to large. Quality will be hit and miss until we start new crops and defects will continue to be present (styler/skin breakdown and some decay). Pricing trends on all sizes will likely surge in August, as per seasonal trends. Prevailing demand will ultimately impact pricing, along with the presence of offshore fruit availability.

**Grapefruit:** California Grapefruit is being packed in Riverside and the central valley.

**Imports/Specialties:** Import lemons, oranges and mandarins are available.

## **West Coast Lettuce**

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**Iceberg: WATCHLIST** The weather is back to mild temps and the crops have improved. Supplies and quality are good but the fields are projected to have lower yields the next few weeks, so we may see higher markets on the way. There have been some reports of thinner texture from the hot weather.

**Iceberg VA:** Quality and supply look good. Growers are expecting increased demand on carton and VA Iceberg with school starting.

**Romaine, & Romaine Hearts: WATCHLIST** Romaine, and romaine heart supplies are good. Product is slightly dehydrated from the high heat, and you may see some light fringes burn on the carton romaine. You may see high core, but overall quality is good. Growers are shooting for a light green color as opposed to a darker leaf to try and avoid some of that tip burn and mechanical damage.

**Green Leaf and Red Leaf –WATCHLIST:** Production in the Salinas Valley is steady. Overall quality is very good with good movement. Supplies have decreased a bit, so we are going to leave this one on the watch list.

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

## Eastern and Western Vegetables

**Green Bell Pepper: ESCALATED** Lighter supply in the east and west has spiked the market and expect conditions to be the same for the next week. Transition in both regions combined with weather related supply as well as quality issues have impacted supply until we can get into newer blocks. In the west green supplies are slowly improving, however we will need to keep a close eye on the west as the heat wave will impact the early crop out of Bakersfield and Arvin.

**Color Bell Pepper: EXTREME** Very light supply and fair quality will impact the market for the next ten days, mostly due to the heat on the west coast. Seeing some poor quality, soft pepper and sun scald. Expect to see challenges continue over this next week. In the east with the transition color pepper is almost nonexistent which we hope to see improving supply over the next two weeks, but pro-rates and shorts are expected. There are some hot house peppers available from Mexico and Canada. We recommend subbing to orange or green pepper over the next two weeks.

**Mini Sweet Pepper:** Supply will be hit and miss this week loading in California.

**Mixed Chili Pepper: ESCALATED** Supplies have been very slow to improve, however we are turning the corner somewhat as more volume crosses from Mexico and California production ramps up. In the east, we could see GAPS on hot pepper based on the track of Tropical Storm Debbie. We are watching this development closely and will provide updates as soon as possible. The shortest items this week are red fresno and habanero.

**Eggplant:** Good supply and quality available this week out of the Central Valley and Southeast. We will need to watch the west as they are about to be hit by a heat wave that could damage unprotected crops.

**Slicer Cucumbers:** Steady supply this week crossing in Otay and McAllen. Domestically some of the local regions are scratching such as Tennessee and Michigan. Overall, the quality is good.

**English Cucumbers:** Stable supply and good quality will be available this week.

**Pickles:** Supply and quality are good this week.

**Green Beans: ESCALATED** Supply remains light this week and quality hit and miss due to weather-related pressure.

**French Beans: WATCHLIST** Production continues to improve and markets have leveled off.

**Zucchini/Yellow Squash:** Excellent supply out of California as well as several local regions. Quality is good.

## Herbs

Good supply and quality on all herbs, except for dill and tarragon, which is being affected by weather in Mexico, Peru and Colombia. Chervil production is low.

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**

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**Cantaloupe:** Over the past week, the westside district felt a reprieve from the excessive heat in July. This has assisted in slowing down and the acceleration of fields to a more normal pace. Markets were firmer this week, but we continue to see good numbers and sizing leaning primarily 9s and 9Js while 12's are making up approximately 10% of the daily harvest and quality has been outstanding.

**Honeydew:** Honeydew availability is trending to larger fruit (5/5Js) like the cantaloupe. Smaller sizes have been fetching a premium due to limited availability. Externally, we are still seeing some sugar netting (scarring), and this has been common in the entire valley and is being attributed to varietal/climatic causes. Internal quality has been excellent with consistently high brix levels – 14-17%.

**Golden Honeydew:** Supply available out of California.

**Watermelon:** Good supply available as new crop is being harvested out of North/South Carolina, California, Missouri, Texas and Mexico. Most of the eastern growers are limiting their harvest as Tropical Storm Debby impacts the east coast. We will assess those crops after the storm passes.

## **Mixed Vegetables**

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**Artichokes: ESCALATED** Overall supplies are still light. Quality is good.

**Arugula:** Supplies are good, and quality is fair. We are seeing some seeder, so the packs look “stemmier”

**Asparagus: ESCALATED** Southern Baja production has remained the same this week, heavy on smaller sizes. Production in Guanajuato remains the same as well but will start wrapping up their season in two to three weeks, depending on heat in the fields. Peruvian volume continues to improve, but cooler temperatures are slowing down growth of the bigger sizes. Southern Peru should start to harvest in two to three weeks. White asparagus continues to be out until end of August and will still be limited until November. Markets are less active on smalls and standards, more active on large, XL and jumbo.

**Bok Choy: ESCALATED** Supplies and quality are both looking good. Market is improving.

**Broccoli/Broccoli Crowns: ESCALATED** Quality and supplies have both improved, but we have seen some slowed growth due to the heat. The slowed growth has caused some supply issues, but things are improving.

**Broccolini and Sweet Baby Broccoli:** Quality is good, but supplies are limited in some areas. Things are improving though.

**Brussels Sprouts: ESCALATED** The outlook for supplies is improving. You can still expect to see an escalated market on the bulk items. Quality is good and insect injury has reduced but the elongated seed stem/core are still present.

**Carrots: (JUMBOS, MEDIUMS and CELLOS):** Steady supplies continue with good Quality.

**Cauliflower: WATCHLIST** Quality and color are very good, but heat damage has caused a bit of a lighter supply. Things are okay right now, but we will be watching this item to see if there are any more issues.

**Celery:** Quality and supplies are okay, but there are some heat issues and insect pressures.

**Cilantro: ESCALATED** The market is active and supplies are good but high demand has escalated the market.

**Corn: EXCALTED** Supply is hit and miss in the east due to transitional gaps and poor quality is prevalent due to insect pressure. In the west supply is stable. Markets remain firm this week.

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

**Garlic:** Slight delays in the new crop California Garlic getting started as growers have experienced some growing challenges. Quality remains good with very good demand.

**Ginger:** Supplies and market are steady

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

**Green Onions: WATCHLIST** Due to the extreme heat and humidity, we are seeing reduced yields from harvesting and will likely see the market gradually escalate over the next few weeks.

**Mushrooms:** Supply was lighter this week, particularly on cremini's. Quality remains good.

**Napa Cabbage: ESCALATED** We continue to see some quality issues, but we should see an improvement over the next few weeks. Quality and supplies are improving.

**Parsley: ESCALATED (Curly, Italian):** Supplies are improving quality is fair.

**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, and quality is good although supplies continue to be tight. Market remains very active, but things do seem to be improving.

**Spinach: WATCHLIST** Supplies are still good with very good quality. There has been some insect activity on the Organic Spinach.

**Spring Mix:** Supplies are good with very good quality.

**Snow Peas and Sugar Snaps: ESCALATED** We have started to see some Guatemalan snow peas, but no sugar snaps. Peruvian peas are available in Miami, but current vessel is delayed until the weekend. Markets have come off with more Peruvian peas available. Out of the west, snow now pea supply is fair, while sugar snap pea supply will be limited due to weather related issues.

#### **Onions: ESCALATED**

There is a high demand anticipated for the upcoming week to meet the supply. Production in California has decreased, as some summer shippers have already completed their deals. The recent high temperatures may lead to quality issues. Washington will start shipping early varieties within the next 5-7 days, beginning with primarily yellows followed by reds later in the week. The initial size profile is expected to be on the smaller side, which is typical for early varieties. New Mexico is also experiencing a small onion profile currently, resulting in an increase in the price of jumbo yellow onions. Late varieties are generally more visually appealing than early varieties.

#### **Potatoes:**

The market continues to feel stable on all sizes and grades for the moment. We continue to see 40ct/50ct/60ct remaining tight. They are available in mixer quantities, but heavy volumes do not seem to be available now. Smaller size potatoes continue to remain plentiful and challenging to move. There is not much further for the market to fall here, as growers are at the point where it would not make any financial sense to pack them at lower pricing levels. While relief was widely expected for this coming year, nobody thought the FOBs would be quite as low as they currently are. At this point, there does not seem to be a scenario where the market turns around any time before the Summer. The positive news is that quality is strong throughout the state, and there should be no shortage of available products in all sizes and grades. In fact, there will likely be an overlap of this year's current crop into next year so next year could unfortunately be a tough year for grower returns as well.

#### **Tomatoes: East Coast**

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- **Round Tomatoes: EXTREME** Supply is very short across all domestic regions; the heat wave in the west will continue to impact quality and overall yields while in the east continued rainfall will continue to cause harvest delays with limited availability for the market. Overall quality is fair and small fruit is limited.
- **Roma Tomatoes: ESCALATED** Markets remain firm as supply has not hit a good stride yet locally. We expect to remain this way through the middle of next week at the earliest.
- **Grape Tomatoes: ESCALATED** Improving supply locally has put downward pressure on the category. We expect this to continue as more volume locally becomes available.
- **Cherry Tomatoes:** Supply is stable with moderate demand. Quality is good.

#### **Tomatoes: Mexico**

- **Round Tomatoes: EXTREME** Growers are dealing with quality and supply issues out of Jalisco; Baja is seeing a shortfall in supply combined with the high demand due to the USA supply falling short. We expect to see this imbalance for some time push fob prices higher. We recommend subbing to romas to avoid supply interruptions.
- **Roma Tomatoes:** Limited supply continues out of Jalisco as rain continues to impact Southern Mexico causing delays in harvesting. Baja has transitioned from Vizcaino to San Quintin and volume is ramping up. Central Mexico volume remains light crossing through McAllen due to rain related quality pressure. We expect to see good demand with some improvement in supply this week however fob prices will remain higher than expected.
- **Grape Tomatoes: ESCALATED** Supply slowly improving out of Central Mexico and Baja. Markets remain firm due to strong demand from the east. This should stabilize as the east coast production starts to ramp up.
- **Cherry Tomatoes:** Steady supply and good quality available crossing through McAllen and Nogales.
- **Medley Grape Tomatoes:** Good supply available this week quality is good.
- **Tomato on the Vine:** Steady volume available this week.

#### **California Tomatoes – EXTREME**

- Mature greens will be very short this week out of the Central Valley due to the extreme heat the region experienced over the past month. We are seeing heavy losses and quality issues emerge post-harvest. We hope to see improvement over the next two weeks, markets will be extremely volatile.

#### **Other Fruit:**

**Apples:** Washington State Apple Crop continues to produce good supplies and good quality products. The Core Varieties, Reds, Golds, Galas, Fujis, Gr Smiths, and Honeys, will make it to a new crop. Galas are down 600,000 boxes from last year, but the state still shows availability that will likely last for the new crop.

**Pears:** The crop appears to be 5 weeks from being finished for the Season. The Bosc Crop is finished for the Season, and Red Anjous should be done in the next 4 weeks. Northwest Bartlett Crop should start around August 8th, leaving us about a 2-week gap between old Anjous and New Crop Barts. The Wenatchee Valley Pear crop was devastated due to freezing temps in February. The Yakima Valley and Hood River Growing Regions were hurt but not nearly as badly as Wenatchee. Bottom line – Pear crop will be extremely tight the entire '24/'25 season.

- Cherries are available out of Washington
- Yellow and White Peaches are available.
- Yellow and White Nectarines are now available.
- Red and Black Plums available.