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Thu 9/19 69° 58°F  AM Clouds/PM	Fri 9/20 69° 58°F  Partly Cloudy	Sat 9/21 74° 58°F  Partly Cloudy	Sun 9/22 73° 58°F  Partly Cloudy	Mon 9/23 74° 59°F  Partly Cloudy	Tue 9/24 73° 60°F  Partly Cloudy	Wed 9/25 71° 59°F  Partly Cloudy	Thu 9/26 72° 60°F  Partly Cloudy
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BAKERSFIELD, CA

Thu 9/19 81° 64°F  Mostly Sunny	Fri 9/20 86° 64°F  Sunny	Sat 9/21 92° 66°F  Sunny	Sun 9/22 94° 69°F  Sunny	Mon 9/23 97° 71°F  Sunny	Tue 9/24 100° 71°F  Sunny	Wed 9/25 97° 69°F  Sunny	Thu 9/26 95° 69°F  Mostly Sunny
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HERMOSILLO, SONORA

Thu 9/19 97° 73°F  Mostly Sunny	Fri 9/20 96° 70°F  Partly Cloudy	Sat 9/21 97° 71°F  Sunny	Sun 9/22 101° 72°F  Sunny	Mon 9/23 104° 74°F  Sunny	Tue 9/24 104° 75°F  Sunny	Wed 9/25 105° 76°F  Sunny	Thu 9/26 106° 77°F  Sunny
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JALISCO, NAYARIT

Thu 9/19 83° 65°F  PM Showers	Fri 9/20 82° 66°F  PM Thunderstorms	Sat 9/21 83° 67°F  PM Thunderstorms	Sun 9/22 83° 68°F  PM Thunderstorms	Mon 9/23 82° 67°F  Thunderstorms	Tue 9/24 81° 67°F  Thunderstorms	Wed 9/25 83° 67°F  Thunderstorms	Thu 9/26 84° 67°F  Scattered Thunderstorms
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SAN QUINTIN, BAJA

Thu 9/19 71° 61°F  Mostly Sunny	Fri 9/20 75° 61°F  Mostly Sunny	Sat 9/21 75° 62°F  Partly Cloudy	Sun 9/22 78° 64°F  Partly Cloudy	Mon 9/23 78° 63°F  AM Fog/PM	Tue 9/24 76° 64°F  AM Fog/PM	Wed 9/25 76° 64°F  Partly Cloudy	Thu 9/26 76° 64°F  Mostly Sunny
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HENDERSONVILLE, NC

Thu 9/19 78° 59°F  Mostly Cloudy	Fri 9/20 81° 60°F  AM Fog/PM Sun	Sat 9/21 82° 60°F  Partly Cloudy	Sun 9/22 83° 62°F  Mostly Sunny	Mon 9/23 79° 62°F  PM Showers	Tue 9/24 78° 62°F  Scattered Thunderstorms	Wed 9/25 74° 60°F  Scattered Thunderstorms	Thu 9/26 73° 55°F  Showers
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Fruits & Vegetables

Avocados: **ESCALATED** Markets are down on the 40s & 48s but up on the 60s and smaller. Last week, shipments closed at 51M pounds across all COOs, with Mexico now accounting for 87% of the market share. Mexico is still harvesting all Loca fruit, with the Aventajada crop expected to begin in October. Q3 shipments to the U.S. on 48s & larger have been 9% higher than last year, while 60s & smaller are 8% less than last year. Mexico is 19% below their projections for Q3, with the fruit still on trees. It will continue to grow, and we can expect the size curve to grow on large fruit. Last week only 1.8M pounds arrived to the U.S. last week from Peru, the same week the previous year brought almost 7M pounds of Peru to the U.S. Year-to-date the season is -10% vs. last year for shipments to the U.S. Total crop is estimated to bring 153M pounds. California harvest was down 43% last week – expected as many harvested heavily the week prior before the heat wave hit all regions of avocado production. Getting fruit off the trees and implementing numerous cooling methods in the

field has resulted in minimal damage. Over the next two weeks, the remaining orchards and packers will be closing their season. Next year is expected to come back with solid volumes; very early estimates show 400M pounds.

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

Pineapples: ESCALATED Supply will remain very light for the next 6 to 8 weeks minimum due to harvest shortfalls. Quality remains good. Sizing will continue to be a challenge during these shortfalls, and we may 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.

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. We are getting concerned the end of the season could fall short due to crop loss.

Berries

Strawberries: ESCALATED Overall volumes continue to be limited due to heat-related quality issues. Weather has been cooler this week out of Watsonville/Salinas, with daytime temps in the mid-60s and nighttime temps in the mid-50s with potential rain in the next few weeks. Production has been steady, though overall output volume is decreasing week-over-week as we get further into the Fall. We are expecting numbers to drop more drastically in late September through early October. Sizing is decreasing a bit. Growers are seeing issues of darker, soft, small, and overripe fruit and mildew due to the foggy mornings. Both methods have good sheen, small-to-medium size, strong red color, and good flavor. Labor is tight. Santa Maria is seeing heavy fog these last few mornings. Due to the heatwave two weeks ago, we are seeing a slight drop in volume this week but are expecting volume and quality to rebound in the following days. Fall crop has continued to see good, strong fruit as the season continues to pick up every week. Fall crop is expecting peak volume to occur in mid-October. Plants are loaded with flowers, so we are expecting large numbers to be produced during the peak. Most blocks show good shape and firmness with crooked tips and light bronzing around. Overall appearance looks decent, and crews are working hard to sort through small, crooked, bronzed, and soft fruit. Seeing sunburnt fruit due to the high heat over the weekend. SC organics will be steady for the next two or so weeks. Growers are expecting an increase in organic and conventional volume in the coming weeks in this area. Organic Spring crops may be wrapping up soon, but Fall crops are increasing in volume quickly. No labor issues.

Blackberries: Blackberry quality is decent, with sizing between the medium to large range, good sheen, primarily black, and with good firmness. Due to high temperatures in the Mexican regions, growers see red cell regression in some ranches and 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 early October. Watsonville blackberries look good, have medium-to-large sizing, and have great flavor. Attached calyx and red cell regression is a continual occurrence and are seeing some issues of smaller fruit. Overall, production is decent, but we have passed our peak for blackberries in Watsonville. We are expecting continually good production through mid-October.

Raspberries: Out of Mexico, rain is happening daily in the afternoons. The weather has been hot and humid, with temperatures in the high 70s to low 80s and nights in the low 60s. Overall, the fruit looks decent with a decent red color, with some fruit lighter in color in the pack due to picking a bit early ahead of the heat. Growers 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 will start to pick back up as we progress through September. Watsonville raspberries' production has sharply declined and will have minimal volume available for the rest of September; however, we will have one last bit of good volume throughout October before ending the season. 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 with very little availability.

Blueberries: EXTREME The industry is currently experiencing a situation where demand surpasses supply due to a notable shortfall in blueberry production. This condition is anticipated to persist until imports from Peru and Central Mexico begin to arrive in the U.S. markets, with significant volumes expected in early to mid-November. Additionally, mid to late October is projected to witness the lowest overall volumes. In the Pacific Northwest, fresh production is concluding, as late-season high temperatures and rainfall have posed challenges, resulting in lower yields and compromised quality, including issues such as softness, shriveling, and mold. The "storage" blueberries, which were preserved in modified atmosphere containers to extend the season into September, are now exhibiting signs of early deterioration, and their quality does not meet the standards for fresh market packing, leading to a diversion of product to processing. Other domestic regions are also facing similar challenges; for instance, Michigan has experienced multiple rain events late in the season, yielding comparable results.

Citrus

Oranges: WATCHLIST The California Valencia orange crop continues to see challenges with quality and supplies as 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. Expect a "GAP" in production between the end of the Valencia season and the beginning of the Navel season, possibly up to 2 to 3 weeks. Expect prorates to increase as we continue through the balance of the Valencia season. Navel season is projected to start in the middle of October.

Lemons: ESCALATED Light supplies continue in California out of D2 with some very light supplies starting to show out of D3, although overall supplies will continue to be light into early October. 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 days/areas will be mandatory to get orders filled on orders loading in California.

Limes: EXTREME Supplies of new crop Limes are increasing, although overall supplies remain lighter than normal. Sizing will be heavy on small sizes as we get more into the new crop with extremely light supplies on large fruit. The market is softened with lighter demand. Quality is improving, but expect to still see some quality defects from the recent weather issues in the growing areas.

Grapefruit - We continue to see significant changes in grapefruit from California, primarily due to the record heat through the summer. Look for record low pack outs and anticipate a gap in production until the Desert crop gets started in late October.

Imports/Specialties: Import lemons, oranges and mandarins are still arriving with lighter supplies.

West Coast Lettuce

Iceberg: Lettuce has great supplies right now. Quality looks good but with the rain and cooler temps, we will be watching out for red ribs.

Iceberg VA: Quality and supply both look very good.

Romaine, & Romaine Hearts: **WATCHLIST** Romaine, and romaine heart supplies are good. Growers do expect yields to start dropping with fall approaching. Quality looks very good but there are still some darker leaves.

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

Eastern and Western Vegetables

Green Bell Pepper: Better supply this week out of Michigan, the Carolinas and West Coast as we get into the last summer regions of the season. Good supply on choice peppers with larger sizes drawing a premium. Overall quality is good.

Color Bell Pepper: **ESCALATED** Improving volume on Red and Yellow Pepper this week. Supply out of Canada is stable; Orange pepper availability was lighter this week. Markets are still holding firm, and the quality is 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. In the east we could see GAPS on hot pepper. The shortest items this week are Fresno and Serrano Peppers.

Eggplant: **WATCHLIST** Tighter supply from all domestic growing regions is putting upward pressure on price and there are very limited crossings available in Nogales and McAllen. We suspect markets will be hit and miss now through the fall transition in late October.

Slicer Cucumbers: **ESCALATED** Supply will be lighter this week crossing through Otay and McAllen. Domestically, some of the fall areas have already started doing a few picks while local regions such as Tennessee and Michigan continue to see good production. Overall, the quality is good, but markets will be higher.

English Cucumbers: Light Supply and good quality will be available this week. FOB prices remain high this week.

Pickles: Supply and quality are good this week.

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

French Beans: Production remains good out of Guatemala. Fair supply and good quality of French beans out of Mexico.

Zucchini/Yellow Squash: Supply remains light this week in the East, particularly on yellow, while supply in the West is stable. Quality is good. We will start to transition to Fall crops over the next 3-4 weeks.

Herbs

Good supply and quality of all herbs, except for dill and thyme, which are being affected by weather in Mexico, Peru, and Colombia. Chervil production continues to be 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

Cantaloupe: Cooler temperatures once again hit the Firebaugh district over the past week which has slowed down production. Temps in the 70-80s are expected to hold through the weekend, but forecasts are showing a return to the 90s for next week. Sizing has pushed to mostly 9/9Js leaving 12/15s in an extremely limited position for at least the short term. As regional eastern melon deals have finished over the past ten days, we have seen increased demand for our western melons. This, combined with lower production, has pushed the market to higher levels. Overall quality remains good with not as high of a shell color that we have seen over the past three months as daylight hours start to reduce. Internal quality remains strong mostly in the 12-14% range which is a common characteristic for the seed varieties that are used.

Honeydew: WATCHLIST Honeydew production has started to improve with a decent spread of sizing (5/6s) seen over the past few days this week rather than exclusively jumbo fruit as was reported last week. Overall availability remains limited, which is keeping the markets firm, but we can finally, confidently, cover all contractual commitments this week. Honeydew quality has been clean, strong and brix levels remain at mostly 12-14% levels.

Watermelon: Stable supply available and demand is light. Fruit is being harvested from a number of regions: Virginia, Maryland, California, Michigan, Texas as well as Mexico.

California Mixed Melon production will continue through mid-October with Yuma set to begin at that time and hope for seamless transition to the fall crop.

Mixed Vegetables

Artichokes: EXTREME Supplies are very tight and will remain that way throughout the month and into October. The marker is at the extreme trigger on the 12-24ct. Growers are holding to averages. Quality is good.

Arugula: Supplies and quality are both good.

Asparagus: ESCALATED Southern/Northern Baja production has remained the same this week. We should see an increase in the next 10-14 days. We have seen bigger sizing this week, but still very low volume. Peruvian volume continues to improve, but still heavy on small and standard sizing. Southern Peru continues to open more fields. We should see better production within the next two weeks. Markets are very active on all sizes.

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 continue to improve but some growers are still seeing lighter supplies. Insect intrusion is also limiting what will be harvested. Diamondback moth damage and larvae are causing issues, which is keeping the market slightly escalated. If you are getting your product from MX, you may still be betting prorated.

Broccolini and Sweet Baby Broccoli: Quality and supplies are good.

Brussels Sprouts: Quality and supplies are both looking very good.

Carrots: (JUMBOS, MEDIUMS and CELLOS): Steady supplies continue with good quality. Supplies from Mexico are improving.

Cauliflower: WATCHLIST Supplies have improved but quality is just okay. We are seeing similar insect damage as we have in broccoli. Cauliflower will remain on the watchlist until the insect issues are no longer a problem.

Celery: Quality and Supplies are okay. There are some heat issues and insect pressures.

Cilantro: ESCALATED The market is active and supplies are very tight. High demand has continued. Growers should be able to cover normal volumes.

Corn: WATCHLIST 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 was lighter this week and they are dealing with quality issues. 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: New crop California Garlic has started. The quality is very good with very good demand.

Ginger: Supplies and market are steady

Green Cabbage: Supplies are steady, but quality is just fair. We are seeing some insect damage and the Diamondback moth has gotten into some of the fields. There are some growers who will be heaving prorating orders that are not meant for concept business.

Green Onions: EXTREME Due to the extreme heat, the supplies remain very tight on green onions. Prices are still at the extreme trigger and growers will be still holding to averages. Some growers do not have any product at all and are cutting orders. A Market Alert has been sent out on this item.

Mushrooms: ESCALATED Supply was lighter this week, particularly on cremini's. 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. We expect to see improved availability in approximately six weeks.

Napa Cabbage: ESCALATED 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: 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: WATCHLIST Supplies are improving but we are seeing some insect damage and inconsistent sizing.

Spring Mix: Supplies are good with very good quality.

Snow Peas and Sugar Snaps: ESCALATED The production of Guatemalan snow peas and sugar snap peas is on the rise. While Peruvian peas can be found in Miami, they are of subpar quality. Market activity for both types of peas has decreased, with an increase in volume from Guatemala. Out of the west, the supply of snow peas remains consistent, and both the supply and quality of sugar snap peas are showing signs of improvement.

Onions: ESCALATED

The onion market has stayed steady. The Northwest is continuing to ramp up volume on all colors and sizes. Size profiles continue to peak on medium and jumbos on yellows, with colossal and super colossal few and far between in the early volumes, although they are starting to improve. There is a belief that this may be the pattern for the entire season, however, it is still early to tell. The cause of this would be the extremely hot summer they experienced here. We are still seeing reds and whites remain elevated, although they should begin to see some relief in the next few weeks. Yellows appear to have stabilized for the minute. There are still more shippers to enter the market, so we will see if the added supply will provide downward pressure. White onions are beginning to soften some as well as we are seeing growers begin to build up inventory of those. The overall 'feel' of the market is beginning to take shape, and it is believed to be a mostly average year for the most part. We will likely see a few lows and a few highs throughout the deal. There is concern about what demand may be like as we ramp up to the election. Historically speaking, demand takes a hit due to various external factors that have happened in the last few election seasons. We are also seeing trucks tighten up some with rates beginning to increase. We do not feel that freight will go any lower than it is today as we head into Q3 and Q4.

Potatoes:

We are exclusively into new crop potatoes at this point in Idaho. The market took a significant increase between last season's old crop prices and the new crop Norkotah prices at the current market. We will likely see this situation remain in effect for another few weeks until additional shippers enter the market and inventories begin to build up. We are currently seeing a much bigger size profile than we have last year. 40ct through 70ct appear to be in good supply throughout the state, and 80s and smaller are on the tighter side. While this should differ some throughout the year as growers switch between lots, it does tell a story that the tuber counts are a lot lower this

year than last year, which will mean less overall supply. We expect we will see the market dip in the short term on large size counts, but as we get into the new calendar year, we do expect to see a price increase. This should be the general pattern for next year as production and pack-outs will only worsen as we get later into the season. We anticipate that we will 'feel' this shortage as we get to about March of next year. There is concern about what demand may be like as we ramp up to the election. Historically speaking, demand takes a hit due to various external factors that have happened in the last few election seasons. We are also seeing trucks tighten up some with rates beginning to increase. We do not feel that freight will go any lower than it is today as we head into Q3 and Q4.

Tomatoes: East Coast

- **Round Tomatoes: ESCALATED** Supply was lighter this week due to weather related delays on greens and VR's. We still recommend subbing to romas as we see volatility in the round market continuing through November.
- **Roma Tomatoes:** Despite the rain, supplies have been stable, and we do forecast a lighter harvest this week with markets firming up a tad. Overall quality will be good this week.
- **Grape and Cherry Tomatoes:** Lighter supply this week as we have seen some cooler temps slow down production in Virginia, Tennessee and North Carolina. Very consistent this week on supply and quality.

Tomatoes: Mexico

- **Round Tomatoes: ESCALATED** Growers are dealing with quality and supply issues out of Jalisco; the best quality is being harvested on the Baja. Volume was lighter this week crossing Otay and McAllen. We expect to see volatile markets continue through October where we will see flushes of fruit then tighten back up once again until November. We recommend subbing to romas to avoid supply interruptions.
- **Roma Tomatoes: ESCALATED** Stable but lighter supply available in Otay, while McAllen is seeing lower numbers and some weather-related quality pressure due to recent rain in Central Mexico. The best quality is crossing through Otay.
- **Grape Tomatoes:** Good supply available and quality is very nice.
- **Cherry Tomatoes:** Steady supply and good quality available crossing through McAllen and Nogales.
- **Medley Grape Tomatoes:** Good supply available this week and quality is good.
- **Tomato on the Vine:** Steady volume available this week.

California Tomatoes – EXTREME

- There will be fruit available this week as growers break newer blocks and hopefully bring some stability to the market for the next few weeks, but the long-term forecast is for supply to be well below normal due to the damages caused by California's extreme heat earlier this summer. The season is expected to run through the middle of October, however, we need to be cautious of quality and supply shortfalls.

Other Fruit:

Apples: Last year, Washington State Apple growers shipped just over 136 million boxes of Apples. This year's total is projected at 124 million. Prices will likely be higher this year and much more manageable of a crop.

Projections below

Red Delicious – 4 million down from last Season

Gold Delicious – 280,000 boxes down from last Season

Gr Smiths – 1.1 million boxes down

Fuji – 1.5 million boxes down

Gala – 3 million boxes down

Honeycrisp – 5 million boxes down

Cosmic – Up 2.7 million boxes.

Pears: The Northwest Pear Crop (Washington/Oregon) is substantially down from last season due to below average temps in late Feb/early March affecting bud development. The higher elevation areas in Washington were severely impacted, especially the Wenatchee Valley. The Oregon Growing Region was not affected as much as Wenatchee, Washington, but it was still impacted.

The Bartlett Crop out of the Northwest shows 3.8 million shipped last season vs a projected 2.9 million this year for a 14% decrease. It's not substantial in terms of overall volume, but it's still a factor. The cold temperatures will affect the grade, so more Fcys will be packed than normal. Because the crop is smaller, the size profile has increased by 1 to 2 sizes. Barts to finish by the end of Feb./ first part of March.

Anjous report at least a 30% total decrease, or 1.85 million boxes less than last year. Also, out of the Wenatchee Valley, there will be more fancy and, for the first time in many Years, a 3rd grade anjous packed. When we start to pack Anjous – I will share pics of 3rd grade, this will be Your value pear. Anjous to start the week of September 16th, and if growers make it through June I will be surprised.

Red Anjous are down 7% or 47,000 boxes, so it is nothing dramatic like the others. The question on Red Anjous is whether or not we will see smaller pears such as 120/135cts. Red pears are supposed to be 1 to 2 sizes larger out of the PNW. Red pears have started with Starkrimsons and will transition into Red Anjou from November through May.

Bosc are down 63% out of the great Northwest or 1.38 million boxes. This variety was mostly affected, and markets will be much higher than in previous years. Bosc has slowly started with a potential end date last January/middle of February.

Pomegranate: Light supply available this week.

Tree Fruit: Lighter supply available as the season winds down on Paches and Nectarines. Good volume available on red and black plums.

Kiwi Fruit: Supplies are tight out of Chile and markets are firming up.