



# Weekly Market Review

## December 05, 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. Growers are hoping this will improve over the next five weeks. Higher markets will likely persist through 2024, with smaller sizes remaining elevated. However, increased availability of 48s is expected to shift dynamics, narrowing the price gap with the 60s and reclaiming dominance on the size curve in the coming weeks. Arrivals from Colombia are anticipated to supplement inventories, while larger fruit continues to command a premium. As the season progresses, improved sizing should further reduce the disparity between the 48s and 60s, presenting new market opportunities. Transition is almost complete, but we are continuing to see some short supplies and escalating markets. The damage from the heat in Yuma and Salinas left lingering issues and we will most likely feel those effects until the end of the year. Broccoli is still very tight and will likely be prorated. While the heat negatively affected the broccoli market, the cold weather will now slow growth and make the market even worse. Growers are doing their best, but you can expect broccoli to be an issue throughout the rest of the year. The weather in Yuma is starting to improve but there have still been some frosty mornings. That has been one of the factors in the yields continuing to be low as we have moved into Yuma. Endive, escarole, leeks, cilantro and fennel are still escalated and look to remain that way through the year. Bok Choy, Broccoli, Cauliflower and Artichokes have stayed at the extreme trigger. These items will be held to averages. All of these items are all very light in supplies. Growers will be holding on to averages and it is likely that you will still see some prorates. Spring mix is no longer escalated, and yields are improving. Spinach is still escalated but will likely be back to normal pricing in 2 weeks. Broccolini is still very tight, and most growers are continuing to hold to averages. Green cabbage 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 has thrown us a few curve balls and has been a bit rough but we are starting to come out the other side. As a reminder, some growers are still loading out of Salinas and there will be transfer fees on some items with some growers. This is normal and happens each year during Transition. Please be aware that you may see some of these fees if you are loading in one location and not all the items have been transferred over to the new location yet. Most growers are in Yuma now, but we do still have a few growers still in the process with some items and some items are still being transferred.









### Alert List

- Asparagus – **ESCALATED**
- Artichokes – **EXTREME**
- Avocados – **ESCALATED**
- Bell Pepper (Green) – **ESCALATED**
- Bok Choy – **EXTREME**
- Broccoli, Florets and Crowns – **EXTREME**
- Brussel Sprouts-**ESCALATED**
- Cabbage-Green – **ESCALATED**
- Cabbage-Red-**ESCALATED**
- Cauliflower –**EXTREME**
- Celery – **ESCALATED**
- Corn – **EXTREME**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- French Beans – **ESCALATED**
- Green Beans – **ESCALATED**
- Hot Peppers (Yellow Caribe, Habanero, Shishito) – **ESCALATED**
- Leeks – **EXTREME**
- Lettuce, Boston– **ESCALATED**
- Lettuce, Iceberg and VA Blends – **ESCALATED**
- Romaine Hearts and Romaine Blends – **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 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Mon 12/9	Tue 12/10	Wed 12/11	Thu 12/12
63°   48°F	69°   51°F	71°   50°F	65°   46°F	64°   54°F	71°   51°F	70°   52°F	69°   51°F
 AM Clouds/PM	 Partly Cloudy	 Mostly Sunny	 Cloudy	 Sunny	 Partly Cloudy	 Mostly Cloudy	 Partly Cloudy









**YUMA, AZ**

Thu 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Mon 12/9	Tue 12/10	Wed 12/11	Thu 12/12
79°   53°F	80°   52°F	78°   46°F	76°   46°F	73°   50°F	68°   44°F	68°   44°F	73°   44°F
 Sunny	 Sunny	 Sunny	 Partly Cloudy	 Sunny	 Sunny	 Partly Cloudy	 Mostly Sunny









**HERMOSILLO, SONORA**

Thu 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Mon 12/9	Tue 12/10	Wed 12/11	Thu 12/12
83°   50°F	82°   50°F	82°   50°F	82°   49°F	82°   49°F	81°   54°F	80°   50°F	79°   51°F
 Sunny	 Sunny	 Sunny	 Sunny	 Sunny	 Sunny	 Partly Cloudy	 Partly Cloudy









**JALISCO, NAYARIT**

Thu 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Mon 12/9	Tue 12/10	Wed 12/11	Thu 12/12
84°   56°F	82°   58°F	79°   59°F	74°   57°F	81°   58°F	82°   58°F	82°   59°F	82°   58°F
 Mostly Sunny	 Partly Cloudy	 Mostly Cloudy	 Cloudy	 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Sunny









**VIZCAINO, BAJA**

Thu 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Mon 12/9	Tue 12/10	Wed 12/11	Thu 12/12
96°   61°F	94°   64°F	87°   64°F	86°   56°F	92°   55°F	91°   55°F	93°   59°F	91°   61°F
 Partly Cloudy	 Partly Cloudy	 Cloudy	 Partly Cloudy	 Mostly Sunny	 Partly Cloudy	 Mostly Sunny	 Partly Cloudy









**CULICAN, SINALOA**

Thu 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Mon 12/9	Tue 12/10	Wed 12/11	Thu 12/12
94°   56°F	91°   57°F	87°   58°F	87°   55°F	88°   54°F	87°   53°F	89°   56°F	84°   57°F
 Partly Cloudy	 Partly Cloudy	 Partly Cloudy	 Sunny	 Mostly Sunny	 Partly Cloudy	 Mostly Sunny	 Partly Cloudy

**QUINCY, FL**

Thu 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Mon 12/9	Tue 12/10	Wed 12/11	Thu 12/12
65°   32°F	54°   29°F	60°   34°F	69°   49°F	73°   61°F	75°   59°F	63°   36°F	55°   35°F
 PM Showers	 Mostly Sunny	 Mostly Sunny	 Partly Cloudy	 Cloudy	 Showers	 Rain	 Mostly Sunny

**IMMOKALEE, FL**

Thu 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Mon 12/9	Tue 12/10	Wed 12/11	Thu 12/12
77°   50°F	79°   50°F	76°   51°F	80°   55°F	84°   61°F	85°   64°F	83°   56°F	72°   52°F
							
Sunny	Mostly Sunny	Sunny	Mostly Sunny	Partly Cloudy	Partly Cloudy	Partly Cloudy	Partly Cloudy

### Fruits & Vegetables

**Avocados: ESCALATED** Imported volume had a nice 17% increase last week bringing a total of 54.5M pounds to the U.S. For the last 6 weeks, Mexico has been unable to export over 50M pounds to the U.S. for two consecutive weeks. The Main Crop currently has a dry matter estimate of 27.8%. In the field, availability is stronger for small sizes and sizes 40 and larger are in tighter supply. Due to an extended rainy season, there has been an increase in grade 2 fruit. The industry expects harvests to be reduced during the December holiday weeks. However, the industry is working to ramp up volume and harvest ahead of the short weeks. The USDA has imposed restricted packhouse production hours industry-wide, contributing to the tighter supply and limited packhouse capacities.

**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:** 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 supplies but with the recent rains we expect to see the availability of larger sizes slowly 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** – We continue to see a decrease in supply, of small fruit. The oversupply of larger sizes (110s, 150s) has kept current pricing steady in that size range, while the scarcity of medium and small sizes, particularly 230s, has led to an increase in pricing on small sizes. Expect higher pricing in the coming weeks as demand increases for the holiday season.

**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 will start in Mid-December.

### West Coast Lettuce

**Iceberg: ESCALATED** - Lettuce supplies are still a little tight but the market is improving. Weights are better but are still slightly lower than normal. Most growers are still holding to averages but quality is improving and is looking much better. Yields are improving as the weather warms up in Yuma. The market is coming down but will stay slightly escalated for a few more weeks.

**Iceberg VA: ESCALATED**– 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: ESCALATED**- Romaine and Romaine heart supplies are still tight. We are still seeing light weights and growers holding to averages. The Romaine Hearts market is still escalated but is no longer at the extreme trigger. Romaine is no longer escalated. We are seeing darker outer leaves but not much breakdown. The market is improving.

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

**Green Leaf and Red Leaf:** Overall quality is good but sizing is trending small and the weights are on the lighter side. Supplies look good and quality is continuing to improve.

### 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 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 is on an upward trajectory out of Guatemala and is anticipated to keep improving. However, there is a limited supply of French beans from Mexico as a result of weather conditions.

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

### Herbs

Basil availability and quality from Mexico will remain limited due to cold weather conditions. Additionally, other herbs are anticipated to be impacted by the same cold weather in Mexico. The situation will be unpredictable over the next few weeks. Domestic Sage volume is down and will likely remain limited through the year.

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

Demand for both cantaloupe and honeydew has strengthened even further over the past week due to the desert wrapping up and honeydew crossings in Nogales quickly declining. The majority of the country has transitioned to offshore melons; our shippers are working hard to ensure the shipping delays caused by Tropical Storm Sara last weekend are ironed out. We hope to see these carriers return to a more normal schedule next week following the holiday week. With the volatility over the next several weeks we need to be flexible on sizing and shipping dates to fill orders.

**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** After further assessments; it's been determined the fields were more heavily impacted by the effects from the storm than cantaloupe which has caused higher daily cull rate percentages. With Mexican crossings coming to an abrupt stop, as they transition to the southern district, we are realizing a perfect storm from the only two growing regions during December. Honeydews we are seeing making it in from Guatemala have had good size (5/5Js) and have been very clean. Brix levels are mostly sitting in the 12-13% range. Flexibility of sizing could likely be required at time of loading to ensure coverage as markets have reached "demand exceeds supply" status.

**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 remains low due to seasonality. Northern Sonora (Caborca) should start in the next 7-10 days. Peruvian volume remains steady, which should continue for the next 7-10 days. Markets continue to be less active with the holiday rush wrapping up.

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

**Broccoli/Broccoli Crowns: EXTREME** Quality is improving, but growers are still seeing much lighter supplies. Insect intrusion is heavily limiting what will be harvested. Supplies are going to be limited for most growers for at least a few more weeks. Some growers are seeing insect intrusion, brown bead and premature breakdown. It has also been cold in the mornings in Yuma and that is not helping the broccoli grow. This is all limiting the acres that can be harvested. Expect to see growers holding very strict averages. Some growers are still at the extreme trigger.

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

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

**Carrots: (JUMBOS, MEDIUMS and CELLOS): WATCHLIST** Jumbo Carrot supplies are light, but supplies remain steady on all other sizes and packs with good Quality.

**Cauliflower: EXTREME** Supplies remain tight, and quality is just okay. We are seeing similar insect damage as we have in broccoli. Some growers are holding to weekly averages. Grothe 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** Currently supply is hit or miss in the East due to transitional gaps and poor quality is prevalent due to insect pressure. 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 improved as the desert started production, we expect that Mexico will follow soon. 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 was lighter this week, particularly on Cremini's and Ports. In the west growers from Canada to California are dealing with supply shortfalls across the entire category due to weather impacts as well as virus pressure. Supply will get tighter over the entire category as the Thanksgiving Holiday will increase over the next couple of weeks.

**Napa Cabbage: ESCALATED** Quality and supplies are improving but there is some insect pressure.

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

**Rapini:** Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

**Red Cabbage: 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** Guatemalan snow pea production has seen an improvement this week and is expected to enhance further next week. However, the production of sugar snaps is declining due to adverse weather conditions. In Peru, the production of both snow peas and sugar snaps has concluded because of seasonal changes. The markets are currently very dynamic, with domestic supplies of snow peas and sugar snaps being quite restricted. Mexican production of snow peas has commenced, while sugar snaps are anticipated to be available in 3 to 5 days. Overall, market activity remains active.

**Onions: ESCALATED**

The onion market has stayed steady. The Northwest is continuing to ramp up volume on all colors and sizes. Size profiles continue to peak on medium and jumbos on yellows, with colossal and super colossal few and far between in the early volumes, although they are

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

#### **Potatoes:**

We are exclusively into new crop potatoes at this point in Idaho. The market took a significant increase between last season's old crop prices and the new crop Norkotah prices at the current market. We will likely see this situation remain in effect for another few weeks until additional shippers enter the market and inventories begin to build up. We are currently seeing a much bigger size profile than we had last year. 40ct through 70ct appear to be in good supply throughout the state, and 80s and smaller are on the tighter side. While this should differ some throughout the year as growers switch between lots, it does tell a story that the tuber counts are a lot lower this year than last year, which will mean less overall supply. We expect we will see the market dip in the short term on large size counts, but as we get into the new calendar year, we do expect to see a price increase. This should be the general pattern for next year as production and pack-outs will only worsen as we get later into the season. We anticipate that we will 'feel' this shortage as we get to about March of next year. There is concern about what demand may be like as we ramp up to the election. Historically speaking, demand takes a hit due to various external factors that have happened in the last few election seasons. We are also seeing trucks tighten up, with rates beginning to increase. We do not feel that freight will go any lower than it is today as we head into Q4.

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

- **Round, Romas and Snacking Tomatoes: EXTREME** Over the past few weeks, Florida, which is the primary domestic production point for tomatoes for the next several months, experienced significant impacts from Hurricane Helene and Hurricane Milton and has seen catastrophic flooding and crop loss. Growers will be assessing losses but expect markets to be extremely short for the next 5 to 7 weeks. Fortunately, we see decent production out of Quincy and Bainbridge, which is helping the current market, but will end soon. For the next several weeks, we expect to see volume out of the region at 20% or less of the normal levels. Act of God declarations have been made by several East Coast suppliers. We anticipate active markets and short availability on volume over the next 5 to 7 weeks depending on the extent of the damage done in Immokalee and Ruskin.

#### **Tomatoes: Mexico**

- **Round Tomatoes: EXTREME** Lighter numbers this week crossing from all shipping points. Large fruit is the shortest; overall volume will be at seasonal lows in general from all growing regions. We expect to see volatile markets continue. We will see flushes of fruit then tighten back up over the next several weeks. Markets will see added pressure through the Holidays as demand that would be pulling from Florida will shift West due to the devastation caused by Hurricane Milton.
- **Roma Tomatoes: EXTREME** Improving volume crossing through Otay, Nogales and McAllen this week as growers transition from Summer to Fall regions. Markets will be very active due to the losses on the East Coast and demand moving to Mexico. Quality is good.
- **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.