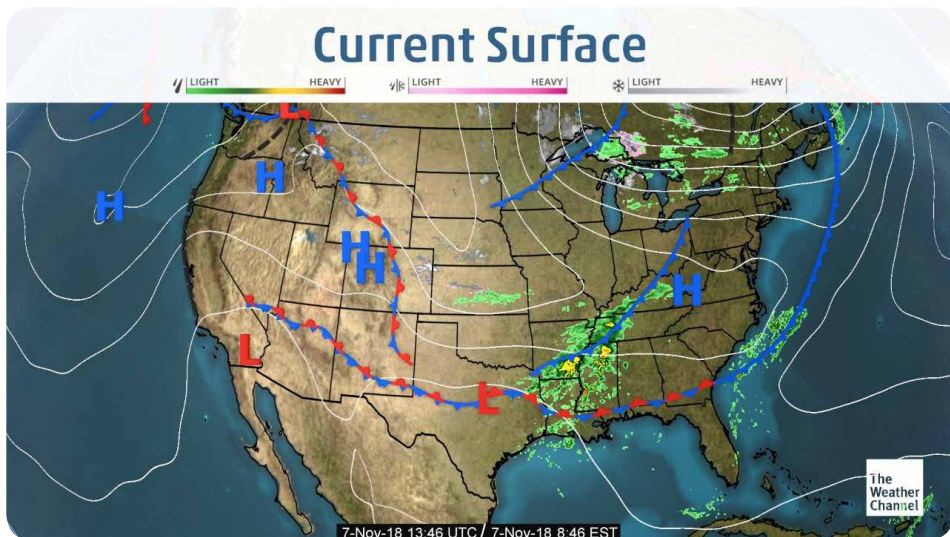


Nov 7, 2018

the source

Weather Update

Off shore flow brings a warming trend to California into next week with cold mornings and strong winds in Southern California and the southwestern Desert regions. Seasonal temperatures and isolated showers continue across Central Mexico through next week with drier conditions to the north. A weak frontal system moves into northern Florida with possible showers mid week. A stronger wetter system looks to move into the region early next week with rains, cooler temperatures and gusty winds.



Market Alerts Continued

Avocado (Mexican) Continued:

Unfortunately, because of the limited supplies and the time lapse between harvest, fruit arriving into the U.S. and the ripening process, we can expect to see green fruit and or early staged fruit (stage1/2) for the begging of next week. Ripe fruit will not be an option this coming week. If crews do in fact harvest tomorrow or Thursday, preconditioned fruit could be available (at the earliest) by the end of next week. There really is no definitive schedule yet, as fruit takes 5-7 days to ripen. Availability will vary per DC as fruit crosses from Mexico into Texas. Keep in mind transportation/trucks will be tight once fruit becomes available.

Bell Peppers (Eastern): Very tight supply continues and will for the next week.

Cucumbers (Eastern): More production starting in Florida.

Eggplant (Eastern): Tight supplies on fancy product, good supplies on choice product.

Onions: Transportation is limited

Potatoes: Transportation limited due to the extra demand for the Thanksgiving Holiday.

Potatoes (colored): Transportation limited.

Squash (Eastern): Plenty of squash supply.

Stone Fruit: Nectarines are done for the season. Peaches are very limited. Plums are phasing out.

Market Alerts

Apples: There are extremely limited supplies of small size apples out of Washington. Particularly 125ct and smaller. We will experience this for the duration of the season. This has caused the market to trend higher.

Avocado (Mexican): Tuesday 11/6 meeting in Mexico City could determine if Mexican harvest will resume tomorrow (Wednesday), or if they will continue with the strike. As of now, most think the agreement will be made to resume harvesting. Still no details on the specific terms of the negotiation. If harvesting does resume, we could see new fruit begin to cross as early as this weekend. Again, that is dependent on "if" things resume. Best case scenario, it will still take 7-10 days to recover and build up inventories. As shippers are seeing current inventories disappear quickly this week, they are advising that supplies will be extremely limited next week. This will be an industry wide issue. In an effort to help cover demand, suppliers are currently moving fruit from on DC to another as well as repacking fruit. However, this is primarily focused around green fruit. As most of our network is foodservice, we rely on our shippers to provide us with preconditioned fruit at different stages of ripeness.



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Truckin' Along

California trucks remain adequate with rates remaining steady. Trucks in Yuma are steady as well. Washington apple truck supply is adequate as well. Idaho potato and onion trucks remain tight with rates increasing. The national average on diesel remained steady this week and is currently at 3.338 per gallon. An increase of .456 from this time last year. California prices are steady as well.

U.S. On-Highway Diesel Fuel Prices* (dollars per gallon) [full history](#)

| | Change from | | | | |
|----------------------------|-------------|----------|----------|----------|----------|
| | 10/22/18 | 10/29/18 | 11/05/18 | week ago | year ago |
| U.S. | 3.380 | 3.355 | 3.338 | ↓ -0.017 | ↑ 0.456 |
| East Coast (PADD1) | 3.369 | 3.346 | 3.329 | ↓ -0.017 | ↑ 0.481 |
| New England (PADD1A) | 3.368 | 3.365 | 3.362 | ↓ -0.003 | ↑ 0.550 |
| Central Atlantic (PADD1B) | 3.533 | 3.523 | 3.498 | ↓ -0.025 | ↑ 0.523 |
| Lower Atlantic (PADD1C) | 3.254 | 3.217 | 3.205 | ↓ -0.012 | ↑ 0.441 |
| Midwest (PADD2) | 3.333 | 3.310 | 3.286 | ↓ -0.024 | ↑ 0.425 |
| Gulf Coast (PADD3) | 3.152 | 3.117 | 3.106 | ↓ -0.011 | ↑ 0.438 |
| Rocky Mountain (PADD4) | 3.408 | 3.405 | 3.398 | ↓ -0.007 | ↑ 0.433 |
| West Coast (PADD5) | 3.871 | 3.848 | 3.833 | ↓ -0.015 | ↑ 0.501 |
| West Coast less California | 3.587 | 3.564 | 3.538 | ↓ -0.026 | ↑ 0.463 |
| California | 4.096 | 4.074 | 4.068 | ↓ -0.006 | ↑ 0.527 |

A Peek at Peak Seasons

Cucumbers (Eastern): cucumbers are not in peak availability but the production is starting to pick up.

Squash (Eastern): Squash is in peak availability.

Transitions & Temperatures

Bell Peppers (Eastern): Bell peppers are starting to transition to Florida but shippers are struggling with poor yields.

Cucumbers (Eastern): Cucumbers are transitioning to Florida.

Eggplant (Eastern): Central Florida has started light production but the transition will come next week.

Squash (Eastern): Squash production is transitioning to Florida.

Stone Fruit: Import season expected to start late December.

Commodity Updates



APPLES

We continue to have a difficult time securing small sized fruit particularly in the 125 count and smaller out of Washington. The other states have had success in having supplies of small fruit. Although once their season finishes this will put major strain on supplies out of Washington. We have a full line of all varieties of apples from multiple states. The market has firmed up tremendously out of Washington with the other states to follow in suit. The overall quality has been exceptional with good pressure tests for slicing apples and sugar levels at a normal level.

ASPARAGUS

Southern Baja (Constitucion) continues to be unchanged in both weather, and production this week. We should see demand pickup next week due to the holiday pull starting. Weather and production are still good in both growing regions in Peru. Markets in the west are still sluggish but should pick up next week due to the holiday pull starting. Markets in the east are still steady and should continue this trend due to the container volume arriving being the same next week.

AVOCADO (MEXICAN)

Unfortunately, the situation in Mexico is still not resolved and there will be no harvests this Monday nor Tuesday. The most optimistic expectation is for harvests to resume on Wednesday, however, that is not guaranteed at this time.

Monday, 11/5, all roadblocks will be lifted to allow packinghouses with inventory (dating back from harvests Oct 26 & 27) to cross their inventory into the US. From an industry perspective, the amount of inventory that will ship from packinghouses on Monday is roughly 10% of weekly border crossings into the US, meaning even with the influx of inventory the supply constraint throughout the United States will still be felt by all participants and there will be a shortage of supply. Roadblocks will be back in place on Tuesday and forward, as we await the outcome of a meeting scheduled to take place in Mexico City on Tuesday, 11/6 with Mexican government officials. This meeting is intended to strongly encourage government involvement to assure safety from ranches to packinghouses and from packing-

houses to border. Until the government can assure safety, there will not be harvests as the risks at the current moment are far too great. The expectation of Wednesday harvest assumes government support is the outcome from Tuesday's meeting. If the government does not get involved as a result to the upcoming meeting, there is great uncertainty when harvests will resume. USDA has not quoted pricing as of Friday last week and market pricing will be day to day.

Supply Chain Schedule IF Harvests Occur on Wednesday

Wednesday – Harvest

Thursday – Packinghouse & Precool

Friday – Ship to Border

Saturday – Border Crossing & USDA Inspection

Monday – Fruit available in the US

BELL PEPPERS (EASTERN)

Georgia is starting to wind down on an already low yielding crop. Florida is starting with light production but shippers there are experiencing the same issues with early fields that Georgia had, low yields and small size. The later fields in Georgia have better quality and size but with cooler weather production has slowed. A front producing some rain moved through the southeast Sunday night bringing harvest to a near standstill early in the week. The forecast for the rest of the week is scattered showers most days. We expect tight supplies on bell peppers into next week.

BELL PEPPERS (WESTERN)

Green Bell Peppers – Harvest of Green Bell pepper have finished out of Fresno. Grower/Shippers now harvesting moderate to good volume out of the Coachella Valley. More choice and medium grade being packed at this time with few larger size. The quality of the peppers being reported as good. Currently, supply meets demand. Price should remain steady through the remainder of the week in the teens for a choice grade pepper and low to mid 20's on #1 pepper. Light supplies available through Nogales. Green bell peppers from Mexico are also available to load in McAllen, TX.



Commodity Updates



BELL PEPPERS (WESTERN) CONTINUED

Red Bell Peppers – Light supply of red bells being harvested at this time in Fresno and coastal areas. California growers have now transitioned to the Coachella Valley. Hot-house Red bells are also available to load out of San Diego, from Baja growing district. Volume out of Baja has started to decrease. Bell pepper from Baja growing district should finish up in November. Few hothouse red bells are crossing through Nogales From Jalisco, Mexico. The quality of the peppers in all districts remains good. Pricing has remained steady on #1 and choice grade peppers. Supply meets demand. Red peppers are currently shipping from San Diego, Fresno. Hothouse red bells from Mexico are also available to load in McAllen, TX and Nogales, AZ.

Yellow Bell Peppers – Hot house peppers are available to load in San Diego, from Baja California. Few Hothouse yellow bells are crossing through Nogales from Jalisco, Mexico. The market is higher along with pricing but remaining steady. Demand is steady along with supplies. The quality of the pepper remains good. Shipping districts out of California in San Diego. Hothouse yellow bells from Mexico are also available to load in McAllen, TX and Nogales, AZ.



BERRIES (BLACKBERRIES)

Blackberry supplies are finally improving. We have moved past the supply shortages and Mexican production is getting up to speed. Domestic harvest is done. Initially, most of the fruit was being sold out of McAllen, TX, but we have seen it make its way out west and has helped fill the pipeline for orders loading in Oxnard. Quality is being reported as good with occasional red cell. Markets have been split; cheaper fruit in Texas and a little more expensive in California. I expect to see supplies continue to improve as we move forward.



BERRIES (BLUEBERRIES)

Blueberries have made a big shift this week in both supply and price. On the east coast in particular, shippers have seen a flush of fruit arrive via boat and plane. These import blues are coming from Peru, Argentina and now light volume from Chile. Most of the inventory is in Miami and prices have dropped this week with plenty of aggressive prices available for spot buy opportunities. On the west coast, we are seeing better supplies of Mexican fruit as well as some South American fruit in Los Angeles. Market prices on the west coast are higher than the east coast, but have also come down from weeks past. Quality is being reported as strong in all areas. We expect to see continued improvements in all areas moving forward.



BERRIES (RASPBERRIES)

Raspberries supplies are improving this week as Mexico production is increasing. We are seeing good volume of fruit available to load in McAllen, TX and Oxnard, CA. The domestic harvest has slowed down, but as expected, we will not see any disruption in supply as we transition to all Mexican production. Quality is being reported as very good and markets have remained steady. I do expect to see promotional opportunities over the next 2 weeks.



BERRIES (STRAWBERRIES)

Strawberry supplies are much better than expected for this time of the year. All shippers had anticipated November to be their shortest production month. However, with the current weather patterns in all growing regions, production has not slowed down. Actually, it continues to be above forecast. Salinas, Watsonville, Santa Maria, Oxnard and Central Mexico are all in production. Supplies are steady with plenty of promotional and volume buy opportunities available. Quality is being reported as good in all areas, but Santa Maria and Oxnard have proven to be the best fruit at this time. Shippers do not expect any major shifts in supply over the next 2 weeks as weather forecasts call for more sunny days and cool nights. Market prices are lower with spot buys opportunities available for the weekend.



Commodity Updates



BROCCOLI

The broccoli market has adjusted slightly lower from last week. More supplies have come on especially on broccoli crowns in the Salinas Valley and Santa Maria areas. Quality is fair with slight purpling, some mechanical damage, and occasional yellow cast. Look for supplies to continue to remain steady going into next week.



BRUSSELS SPROUTS

The Brussels Sprouts market continues to stay steady in Salinas, Santa Cruz, and Watsonville areas. The temps have been relatively mild, which the Brussels Sprouts like, so fields are at budget if not slightly ahead of schedule. Quality has been affected by insect pressure particularly the Diamondback Moth and will be an ongoing battle this season. Look for Brussels Sprouts to remain steady going into next week.



CARROTS

The carrot market continues to remain steady. Quality is good, and supplies are adequate to meet current demand. We see no change in the carrot market until we switch to the southern growing regions around the end of November.



CAULIFLOWER

Cauliflower market continues to stay steady. Overall, the quality has been good with minor bruising and some yellow cast with weights in the 25 to 28-pound level. Look for this market to continue to stay steady going into next week.



CELERY

This commodity is very active in the marketplace and we expect this to continue for another two weeks minimum. Production is Salinas as well as southern California is moderate to light. Defects that have been reported include slight bowing, mechanical as well as light insect damage. Small sizing is the tightest in availability and will command a higher price with multiple shippers. Flexing by suppliers has gone away on all sizing. The weights continue to average between 52-56 pounds.



CHILI PEPPERS

Jalapeño – Light supplies still available from Baja California, in San Diego and Los Angeles from Santa Maria. Light supplies of Jalapeno being harvested from both growing regions and should begin to finish up in the next few weeks. The quality of the pepper is fair at best out of both regions. Nogales now receiving very moderate numbers of Jalapeno and should increase over the next few weeks. The market is steady and along with pricing,. Currently, supplies meet demand. Jalapenos are also available to load in McAllen, TX.

Pasilla – Moderate supplies of Pasilla available from the Baja California and Santa Maria growing areas. The quality of the pasilla remains fair out of both regions. Pasilla out of this region should finish up in the next few weeks. Pasilla market along with pricing remains steady. Nogales has started to receive better numbers of Pasilla from Sonora, Mexico. Good quality being seen in Pasilla from the Sonora growing region. Pasilla are also available to load in McAllen, TX.

Anaheim – Light supplies of Anaheim available from Baja California and the Santa Maria growing areas. The quality of the peppers from Santa Maria and Baja California remains fair. Anaheim out of this region should finish up in the coming weeks. Nogales has started receiving moderate volume of Anaheim from the Sonora, Mexico growing district. The market is steady along with pricing. Anaheim peppers are also available to load in McAllen, TX.

Tomatillo – The market and demand remains high. Currently, Tomatillo demand exceeds supplies on both peeled and husk Tomatillo. Tomatillo shipper out of Nogales have started with low to moderate volume. Volume will increase as we go through the month of November. Good quality on both husk and peeled being reported on supplies out of Sonora. Tomatillos are also available to load in McAllen, TX.

Serrano – Light supplies are still available from Baja, in San Diego and L.A. Low volume of Serrano pepper available to load in Santa Maria. The quality of the pepper has been mostly fair. Serrano out of this region should finish up in the next few weeks. Nogales receiving moderate volume of Serrano from Sonora, Mexico Good quality being reported from this region. Supplies meet demand. Pricing remains steady. Serrano peppers are also available to load in McAllen, TX.



Commodity Updates



CILANTRO

The Cilantro market continues to remain steady as growers are coming in with slightly higher yields than previous weeks. The cilantro quality continues to be good. Look for the cilantro market to continue to stay steady going into next week.



CITRUS (LEMONS)

Lemon supplies are steady. Currently harvesting out of District 3 (desert crop) and District 1 (San Joaquin Valley). Peaking on 140/115/165 size in both growing regions. The fancy to choice spread is 70:30, quality is excellent but color to de-green is taking around 5-7 days for District 1 fruit. Harvesting is ahead of schedule this year, typically district 1 is harvested in December, so being a month early could mean the end of the season will come a month early in May instead of previous years as it tends to end in June. District 3 market is expected to be tight the rest of the fall/winter due to the lack of labor. It's harder for growers to find pickers each day reducing the amount of fruit that can be packed. This is looking to be an industry-wide issue and we'll continue to monitor this closely. The lemon market has finally found some stable ground with deals on smaller sized fruit such as 165 count and smaller. The larger size fruit is steady at current market levels.



CITRUS (LIMES)

Weather calls for minimal rain this week with temps in the 80-90s. Quality has been fair and plenty of volume available on all sizes. Harvest crews are back after taking the weekend off for the day of the dead. They are a few days behind so there is plenty of fruit for later this week. Open market fruit ranges from \$8-\$15 depending on size.



CITRUS (ORANGES)

California Navels season and moving right along. Packing fruit 5 days a week and have good volume to promote. Industry wide larger size fruit is limited. Small fruit is currently the focus plenty of fruit to move. We continue to see an 88/113/138 size structure and quality is good for this time of the year. Exterior fruit color is okay for early fruit and product is firm. Brix averages are 10-11. We are now seeing promotable volume and will continue to push especially on the 72s and smaller. The struggle with supplies in 56s and larger fruit will remain for a few months. Next week's temperatures are expected to be cooler, which will help natural color in the field and bring gassing hours down. Satsuma Mandarins are coloring up nicely and sizing up. Delite Mandarins will start next week peaking on 36/40. Plenty of Pummelos available sizing and quality look great.



CUCUMBERS (EASTERN)

Cucumber production is moving quickly to Florida, Georgia is still in light production, with cooler weather and short days harvesting is slowing down. Many shippers have finished for the season. Most Florida shippers are in good production with more to start later this week, cooler weather is helping quality tremendously on the early fields. More product crossing from Mexico is pulling business from Florida shippers.



CUCUMBERS (WESTERN)

Light supplies of cucumber available in San Diego from Baja California. Moderate supplies should remain consistent through the week. Volume will start to decrease moving through November on every cucumber size. The quality of the fruit is still being reported as good. Nogales shippers have started receiving cucumber from the Hermosillo, Sonora growing district. Volume should continue at a steady pace from the Sonora, Mexico area as we make our way through November. Market and pricing dropping as supplies increase from the Sonora, Mexico. Cucumber supplies meet demand. Cucumber shipping areas include San Diego and Nogales. Light supplies of cucumbers are also available to load in McAllen, TX.



Commodity Updates



EGGPLANT (EASTERN)

Quality remains very good on Georgia eggplant even though growers are packing very heavy to choice. Florida growers have started very light volume, most shippers will not start until next week. Cool weather throughout the southeast has slowed production for the last week and with forecast for the next week being below normal temperatures don't expect production to pick up.



EGGPLANT (WESTERN)

Eggplant- Light volume of eggplant coming out of Fresno. More choice grade fruit currently being packed. Eggplant out of this district should finish up this week. Volume decreasing rapidly due to colder weather in the area. Small Fall crops out of Coachella being harvested at this time where quality is being reported as good. Nogales receiving low volume of eggplant with better numbers expected around the third week of November. Both Fancy and choice being packed. Good quality being reported. Eggplant demand currently meets supply.



GRAPES (GREEN)

We continue to see excellent supplies and quality on green grapes. Sizes are large on greens currently. M/L green grapes are not available, so most shippers are quoting on a L/XL. Berries are crunchy, stems are green and sugar levels are high. They eat very well. Market prices have been steady with plenty of promotional and volume buy opportunities available. Import season is expected for the first of the year.



GRAPES (RED)

We continue to see excellent supplies and quality of red grapes. Central Valley production volume has been far above demand and we have plenty of promotional and volume spot buy opportunities available. All sizes are available. The berries are firm and crunchy, high sugar content, the stems are healthy and green. Markets have been steady on red grapes. We expect domestic production to be strong through December with import season expected to start by the first of the year.



GREEN ONIONS

The Green Onion market continues to remain extremely tight. The wet weather in Mexico and labor issues have caused product to be extremely snug. The recent heat followed with rain has been causing some occasional leaf minor and some mechanical damage. The green onion market will continue to stay strong going the next few weeks.



KALE

The kale market continues to stay steady in the Salinas Valley. Quality continues to be good with good color, full bunches, and only an occasional yellow leaf being reported.



LETTUCE ICEBERG

This market has softened with shippers in Huron and Salinas. Unlike last week, suppliers are having stronger production numbers coupled with the fact that demand has slipped in the marketplace. Huron will continue to produce through next week with this commodity. Production in Salinas is finishing up. Defects on lettuce include decay, misshapen heads, puffy, ribbing and mechanical. The weights on wrap are ranging from 36- 42 pounds. Yuma is in production with lighter weights being reported compared to Salinas and Huron. Expect offers to be given by suppliers. The product is not as strong in quality compared to the last few weeks. Some shippers want to create demand as much as possible.



LETTUCE LEAF

Romaine is very active in all growing regions. Supplies will be very limited throughout this week as well as the following week. Pricing on contracts has escalated as well as value added items. Demand exceeds supplies. Romaine hearts are also very light in availability with all shippers. Common defects with romaine and romaine hearts include twisting, mechanical, insect damage, dehydration, and light weights. Salinas will be finished up within two weeks at most. The weights on romaine are averaging 24-34 pounds pending the shipper. Supplies have tightened up dramatically with green leaf and butter and red leaf is moderate at best. Yuma has begun harvesting all leaf items with product being on the light side, especially the romaine crop.



Commodity Updates



LETTUCE TENDER LEAF

The Tender Leaf market has picked on spring mix, arugula, baby spinach, and cello spinach as we move to transition down to Yuma. Growers in the Salinas Valley are stretching their acreage as best they can until Yuma starts. Quality issues are fair with minimal yellowing and bruising of the tender leaves. Look for these items to remain tight the next couple of weeks until we get down to Yuma.



MELON (CANTALOUPE)

Weather in the desert calls for temps in the 70s-80s this week with no rain in the forecast. Reports of better quality from shippers this week. With California done, fruit out of the desert is ranging from \$14-\$15 on open market fruit. Arizona will run into December and we will also see offshore fruit available in the US at the end of the month. Smaller fruit is very limited as we are seeing a steady supply of larger fruit.



MELON (HONEYDEW)

Weather in the Maricopa growing region this week calls for temps in the upper 70s to lower 80s with no rain in the forecast. Reports of better quality out of the Maricopa and Nogales areas this week. There was some fruit that was affected by the rain from weeks ago. Open market fruit out of the desert ranges from \$7-\$9. We are also seeing fruit from Mexico with fair quality and ranging from \$5-\$6 depending on size. Offshore fruit will start trickling in mid to late November.



MELON (WATERMELON)

Seedless watermelons are available to load in Nogales, from Sonora, Mexico. Watermelon is currently being harvested in the Hermosillo, Sonora growing area. Demand on watermelon has increased over the past couple of weeks with enough supply to meet demand. Pricing is steady on both carton and bins.



ONIONS

Little to no change from previous weeks in the Yellow, Red or White onion markets. This should be the trend for the next couple of weeks if not into the first of the New Year. Quality is excellent. Transportation is starting to tighten up as we are in the middle of the Thanksgiving pull. I would recommend staying ahead of supplies due to the unknown with transportation and Mother Nature.



PEARS

We have steady supplies of pears from California and Washington. The markets are steady and there have been deals on certain varieties. Have good availability in Washington on the following varieties. We have access to Bartletts, Anjous, Bosc, Concorde, Red Crimsons, Red Anjous, Seckel, and Comice. The overall quality has been really nice with good sugar levels and decent pressure testing.



PINEAPPLES

There is a steady flow of pineapples supplies coming from all growing regions. As well as a full range of sizes. The quality has been really nice with sugar levels in the 12 to 15 range and minimal overripe arrivals. The market remains steady from all ports of call.



POTATOES

Carton potato market is steady with good supplies of 80 count and larger available out of all shipping points. This will continue with the good demand for Retail bags taking up the 90 count and smaller for the Thanksgiving holiday. We will have a week break after Thanksgiving before the Christmas holiday kicks in. So look for the carton market to have little change into the holiday season. The only factor that could change the market would be Mother Nature bringing the Polar Vortex down into Idaho with its single digit weather that would limit the transfer of potatoes from the storage to the packing sheds. So this is the time of the year to keep your eye on the weather. Quality is very nice. Transportation is getting tight due to the extra holiday demand. I would recommend staying ahead on supplies.



Commodity Updates



POTATOES (COLORED)

Color potato market continues with little change with good demand for the Thanksgiving holiday pull which is in full swing. Red B's are a little snug out of North Dakota and Wisconsin. Quality is good. Transportation is the biggest issue with not enough equipment to keep up with demand. This will continue into the first of the New Year.

SQUASH (EASTERN)

Georgia is still in production of good quality squash, Florida is in peak season in the central region of the state with Homestead ready to start this week. More product crossing from Mexico is causing some business to shift west. Cooler temperatures and shorter days have not slowed production as much as one would expect. Quality is very good in all producing regions and we expect steady supplies for the rest of the week but the cooler weather will catch up to growers at some point.

SQUASH (WESTERN)

Zucchini and Yellow S/N – Majority of Italian and Yellow S/N out of the West coast is being Harvested out of Sonora, Mexico. Steady supplies of Italian and yellow s/n from this district. Quality on both Italian and Yellow S/N being reported as good. Market on Italian squash is steady while Yellow S/N market is sluggish. Deal's being offered on #1 and #2 labels on Yellow S/N. Squash supplies currently exceed demand. Grey squash also available through Nogales. Squash supplies from Mexico are also available to load in McAllen, TX.

STONE FRUIT

Domestic stone fruit season is coming to an end and supplies of all varieties are becoming more limited. Nectarines have finished with all harvest. Peaches have finished with the exception of only a couple growers and sizes are limited to only large size. Plums are starting to phase out slowly as well. Currently both red and blacks are available, but sizes are leaning on the large size. Market prices have been slightly higher. Quality has been good. The import stone fruit season is expected to start late December with the first arrivals expected for the first of the year.

TOMATOES (EASTERN)

Palmetto/Ruskin is the primary growing region in the east but is still a week or so away from harvests that will ease markets. Round tomato prices have begun to slide with FOBs coming off by a dollar or more this week. Sizing and quality are reflecting the heat the crop was exposed to in earlier weeks during the growing cycle. XL fruit is at a premium with the best value to be found in 6x7, bulk medium packs. Roma tomatoes remain in tight supply with limited volumes coming out of the fields. The FOB market remains beneath the \$20 threshold and expected to improve next week. Like the gas greens, new planting is forecasted to begin as soon as next week offering better availability, sizing, and quality to both varieties. Grape and cherry tomatoes are steady at this time. Grape tomatoes remain limited but will gradually improve as soon as next week depending on the weather. Forecasts for Georgia and Northern Florida show a cold front moving in at the beginning of the week that can dip into the 20's which may extend further south to Tomato growing regions, however, it is not expected to be threatening at this time.

TOMATOES (WESTERN)

California remains shipping from the Central Valley but should be finished by mid-month. Crops are transitioning in the west from California to Baja and Eastern Mexico where crossing are improving each week. Round and roma tomato markets are steady and may not experience much change until mainland Mexico begins winter programs in December. Grape tomatoes remain at elevated pricing as supply and quality have worsened in recent weeks from rain and cool temperatures brought from hurricane systems. There is a wide range in quality across all varieties at this time correlating with pricing, where premiums may be required for consistent quality and condition in pack outs.



Commodities at a Glance



| Commodity / Region | Market | Quality |
|---|---------------|-----------|
| Apples | | |
| Wenatchee/Yakima, WA and Hood River, OR | Higher | Excellent |
| Stockton, CA | Higher | Excellent |
| Hudson/Pleasant Valley/Red Hook, NY | Higher | Excellent |
| Aspers/Gardners, PA | Higher | Excellent |
| Coopersville/Belding/Sparta, MI | Higher | Excellent |
| Asparagus | | |
| Southern Baja, MX | Steady | Good |
| Ica, Peru to Trujillo | Steady | Good |
| Avocado (Mexican) | | |
| Michoacan, Mexico | Higher | Good |
| Bell Peppers (Eastern) | | |
| Hillsborough / Western Collier County, FL | Steady/Higher | Good |
| Lee / Grady County, GA | Steady/Higher | Good |
| Bell Peppers (Western) | | |
| Coachella Valley, CA | Steady/Higher | Good |
| Jalisco, Mexico | Steady/Higher | Good |
| Berries (Blackberries) | | |
| Central Mexico | Lower/Steady | Good |
| Berries (Blueberries) | | |
| Central Mexico | Lower/Steady | Good |
| Tucuman, Argentina | Lower | Good |
| Trujillo, Peru | Lower | Good |
| Southern Chile | Steady | Good |
| Berries (Raspberries) | | |
| Santa Maria, CA | Steady | Good |
| Central Mexico | Steady | Good |
| Berries (Strawberries) | | |
| Salinas Valley, CA | Lower | Fair |
| Watsonville, CA | Lower | Fair |
| Santa Maria, CA | Lower/Steady | Good |
| Oxnard, CA | Lower/Steady | Good |
| Central Mexico | Steady | Good |
| Broccoli | | |
| Celaya Guanajuato Mexico | Steady | Fair |
| Oxnard/Santa Maria, CA | Steady | Fair |
| Salinas Valley, CA | Steady | Fair |

| Commodity / Region | Market | Quality |
|---|---------------|-----------|
| Brussels Sprouts | | |
| Salinas Valley, CA | Steady | Fair |
| Carrots | | |
| Bakersfield/Santa Maria, CA | Steady | Good |
| Cauliflower | | |
| Salinas Valley, CA | Steady | Good |
| Celery | | |
| Oxnard/Santa Maria, CA | Higher | Good |
| Salinas Valley, CA | Higher | Good |
| Chili Peppers | | |
| Santa Maria, CA | Steady/Higher | Fair |
| Northern Baja California Sur, Mexico | Steady/Higher | Fair |
| Central Sonora, Mexico | Steady/Higher | Good |
| Cilantro | | |
| Baja, MX | Steady | Good |
| Oxnard/Santa Maria, CA | Steady | Good |
| Salinas, CA | Steady | Good |
| Citrus (Lemons) | | |
| Coachella, CA / Yuma, AZ | Steady | Good |
| Oxnard/Ventura, CA | Steady | Good |
| Citrus (Limes) | | |
| Veracruz, Mexico | Steady | Fair |
| Citrus (Oranges) | | |
| Merced to Bakersfield, CA | Steady | Excellent |
| Riverside, CA | Steady | Excellent |
| Cucumbers (Eastern) | | |
| Lee / Grady County, GA | Lower/Steady | Good |
| Hillsborough / Western Collier County, FL | Lower/Steady | Good |
| Cucumbers (Western) | | |
| Northern Baja California Sur, Mexico | Lower/Steady | Good |
| Central Sonora, Mexico | Lower/Steady | Good |
| Eggplant (Eastern) | | |
| Hillsborough / Western Collier County, FL | Steady/Higher | Good |
| Lee / Grady County, GA | Steady/Higher | Good |
| Eggplant (Western) | | |
| Northern Sinaloa, Mexico | Steady | Good |



Commodities at a Glance



| Commodity / Region | Market | Quality |
|----------------------------|---------------|-----------|
| Grapes (Green) | | |
| Arvin, CA | Steady | Excellent |
| Delano, CA | Steady | Excellent |
| Fresno, CA | Steady | Excellent |
| Grapes (Red) | | |
| Arvin, CA | Steady | Excellent |
| Coachella Valley, CA | Steady | Excellent |
| Delano, CA | Steady | Excellent |
| Fresno, CA | Steady | Excellent |
| Green Onions | | |
| Mexicali, Baja | Steady/Higher | Good |
| Kale | | |
| Salinas, CA | Steady | Good |
| Lettuce Iceberg | | |
| Huron, CA | Lower | Fair |
| Oxnard/Santa Maria, CA | Lower | Fair |
| Yuma, AZ | Steady | Fair |
| Lettuce Leaf | | |
| Oxnard/Santa Maria, CA | Higher | Fair |
| Salinas Valley, CA | Higher | Fair |
| Yuma, AZ | Higher | Fair |
| Lettuce Tender Leaf | | |
| Salinas Valley, CA | Higher | Fair |
| Melon (Cantaloupe) | | |
| Maricopa, AZ | Steady | Fair |
| Melon (Honeydew) | | |
| Maricopa, AZ | Steady | Fair |
| Melon (Watermelon) | | |
| Central Sonora, Mexico | Steady | Good |
| Onions | | |
| Ontario, OR to Nampa, ID | Steady | Excellent |
| Quincy/Hermiston, WA | Steady | Excellent |

| Commodity / Region | Market | Quality |
|---|---------------|-----------|
| Pears | | |
| Wenatchee/Yakima, WA and Hood River, OR | Steady | Good |
| Stockton, CA | Steady | Good |
| Pineapples | | |
| Heredia, Costa Rica | Steady | Good |
| La Ceiba, Honduras | Steady | Good |
| Retalhuleu, Guatemala | Steady | Good |
| Potatoes | | |
| Hamer/Rupert, ID | Steady | Good |
| Quincy/Hermiston, WA | Steady | Good |
| Eastern Colorado | Steady | Good |
| Plover/Bancroft, WI | Steady | Good |
| Potatoes (colored) | | |
| Rupert to Rexburg, ID | Steady | Good |
| Mount Vernon, WA | Steady | Excellent |
| Pasco/Tri-Cities, WA | Steady | Good |
| Red River Valley, ND | Steady/Higher | Good |
| Plover, WI | Steady/Higher | Good |
| Squash (Eastern) | | |
| Lee/Grady/Echols County, GA | Lower | Good |
| Hillsborough / Sarasota County, FL | Lower | Good |
| Dade / Eastern Collier County, FL | Lower | Good |
| Squash (Western) | | |
| Central Sonora, Mexico | Lower/Steady | Good |
| Stone Fruit | | |
| Madera south to Arvin, CA | Steady/Higher | Good |
| Tomatoes (Eastern) | | |
| Southern Florida | Steady | Fair |
| Tomatoes (Western) | | |
| Northern Baja California Sur, Mexico | Steady | Fair |
| Southern Nayarit/Sinaloa, Mexico | Steady | Fair |

