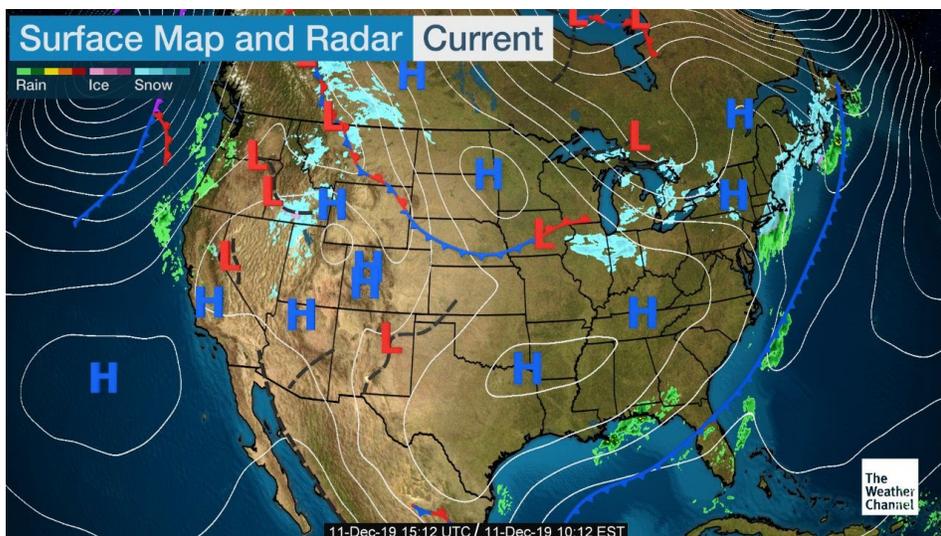


the source

Weather Update

A series of weak storm systems move into Central California with cooler temperatures and possible drizzle. Strong winds and cooler temperatures are expected across Southern California and the Southwestern Desert regions early next week as systems pass to the north. Seasonal temperatures and generally dry conditions are expected across Mexico through next week. A frontal boundary brings scattered showers to Florida mid-week followed by a stronger system across Northern Florida over the weekend. Mild and dry conditions to follow into next week.



Market Alerts

Apples: The highly sought after Cosmic Crisp apple was gone before it was here. With its December 'release party', many shippers were sold out within days due to the minimal amount of bins to pack. January will bring another round of availability, but expectations need to be tempered as the volume will strongly resemble that of December.

Avocado (Mexican): 48's and larger remain limited out of Mexico for the month of December.

Berries (Blueberries): Good availability will keep the markets flat.

Berries (Raspberries): Over production will continue to weaken markets on this item.

Berries (Strawberries): Strawberries remain extremely tight as we move through the water related issues out West.

Carrots: West coast jumbo carrots remain light in supply.

Cucumbers (Eastern): Cucumber supplies are very short.

Grapes (Green): Domestic fruit is limited and quality is poor. I suggest transitioning to import for quality. Import fruit is available but more expensive. Better availability and prices are expected by the end of the month.

Grapes (Red): Domestic fruit is steady but quality is diminishing. Import fruit is now available in limited volumes, but prices are higher. We expect better availability by January.

Pears: Many small shippers will be done for the season, this month, on Bartlett pears; leaving the larger shippers to shoulder all volume through the first week of January.

Potatoes: Larger sizes and #2 grade remains limited. Lead time needed on all russet orders; up to 7 days advised.

Stone Fruit: First arrivals of Chilean fruit expected later this week.

Tomatoes (Eastern): Demand Exceeds Supply. Availability is limited. Markets going higher through next week.

Tomatoes (Western): The recent storms in the west were significant weather systems that have devastated multiple areas of Mexico. Western Supply Extremely Short. Demand exceeds Supply.



Freight Information



Truckin' Along

California and Arizona trucks look to be steady and available for the next few weeks. Washington apple trucks are tight as Christmas trees have started. Idaho onion and potato trucks are both extremely tight. The national average remained steady this week at 3.049 per gallon. California prices dropped slightly and are currently at \$3.904 per gallon. Crude oil remained steady and is currently at \$58.56 per barrel.

U.S. On-Highway Diesel Fuel Prices* (dollars per gallon)

[full history](#)

	Change from				
	11/25/19	12/02/19	12/09/19	week ago	year ago
U.S.	3.066	3.070	3.049	↓ -0.021	↓ -0.112
East Coast (PADD1)	3.054	3.059	3.050	↓ -0.009	↓ -0.144
New England (PADD1A)	3.063	3.078	3.085	↑ 0.007	↓ -0.210
Central Atlantic (PADD1B)	3.247	3.246	3.241	↓ -0.005	↓ -0.127
Lower Atlantic (PADD1C)	2.921	2.928	2.914	↓ -0.014	↓ -0.139
Midwest (PADD2)	2.969	2.982	2.966	↓ -0.016	↓ -0.100
Gulf Coast (PADD3)	2.776	2.779	2.759	↓ -0.020	↓ -0.175
Rocky Mountain (PADD4)	3.246	3.241	3.207	↓ -0.034	↓ -0.032
West Coast (PADD5)	3.720	3.704	3.647	↓ -0.057	↓ -0.005
West Coast less California	3.387	3.382	3.323	↓ -0.059	↓ -0.034
California	3.983	3.960	3.904	↓ -0.056	↑ 0.017

*prices include all taxes

A Peek at Peak Seasons

Bell Peppers (Eastern): Florida Green Bell Pepper is in peak season.

Berries (Strawberries): Better volume is expected out of Central Mexico and Florida over the next several weeks

Eggplant (Eastern): Eggplant is in peak season.

Onions: Storage onions are in peak season with excellent supply and quality!

Transitions & Temperatures

Celery: Yuma is expected to have production in a few weeks.

Cucumbers (Eastern): Cucumber supplies are starting to transition to the Honduran import season.

Grapes (Green): Peruvian green grapes arrivals are increasing every week. Better supplies are expected by the end of the month. Chilean fruit is expected to start in January.

Grapes (Red): Light volumes of Peruvian red grapes are arriving sporadically. Volume will increase as we move forward.

Stone Fruit: New arrivals of Chilean peaches and nectarines will increase as we move forward. Plums are expected in January.



Commodity Updates



APPLES

EASTERN REGION:

The fruit is still plentiful and markets remain steady. We are seeing a lull in movement due to the holidays and schools out for break. Also, with regard to food service, the amount of small fruit is more plentiful this season versus last season. All in all, it's a buyers market and shippers are dealing to keep fruit moving.

WESTERN REGION:

Washington

Let's start out with a hot topic in the world of apples...Cosmic Crisp. It feels like Cosmic Crisps were gone before they were available. Even though most WA shippers are approved to grow/sell the new variety, not all have them have it available to sell. Some shippers are waiting until next season before entering the market, while others had a minimal amount of bins to pack. Initial estimates called for approximately 2.1 million cases statewide, but that amount has been scaled back to approximately 324,000 cases (collectively) for the December release date—with the majority going to retail chains at dollar amounts far exceeding Honeycrisp prices. We are looking to January 2020 for the next round of availability, but expectations MUST be tempered as availability will mirror that of December.

Moving on to the overall market: smaller, foodservice sizes (125ct/138ct) remain plentiful—on most varieties—with some exceptions (Honeycrisp, Pink Lady). Much like Midwest/EC, Washington shippers are seeing less fruit go to export due to high tariffs, causing some to move load volumes at 'aggressive' prices. Couple in the fact that many schools are going on holiday break and we are seeing even more aggressive prices offered. Quality is excellent and with great shelf-life.



ASPARAGUS

Volume from both regions in Mexico (Ciudad Obregon/Northern Baja) remains the same from the previous 2 weeks. Demand has not picked up yet, but should next week with the Christmas/New Year's pull starting. Large sizes remain short from these 2 regions in Mexico. Volume is still heavy from both regions in Peru (Ica/Trujillo), and the larger sizes (Large/X-large/Jumbo) are still plentiful. This trend should continue through the middle of December. Markets on both coasts are steady, but we should see an increase next week with the holiday pull starting.



AVOCADO (MEXICAN)

Not much change in weather for the growing region of Michoacan, Mexico. The forecast calls for clear skies with lows in the 40's and highs in the 70's. Large fruit (48's and larger) remain on the tight side with the heavy "normal crop" currently being harvested. The trees have plenty of fruit, but mostly #2's and small-sized fruit (60's and smaller). This will be the trend through December. The size curve will shift late January and lean heavily on larger fruit (48's and larger). With California and Mexico ramping up production in January, look for promotable volume for Super Bowl.



BELL PEPPERS (EASTERN)

Green bell pepper is coming into peak supply this week in south Florida. All shippers are harvesting steady supplies and some of the bigger growers are in heavy volume. Quality seems to be good with most shippers, but there were some reports of bruising after last week's cold weather but that seems to be cleared up. The forecast going forward is for warm temperatures and good growing conditions, a small amount of rain but not enough to hamper harvesting. Mexico is sending more peppers into the U.S. putting pressure on eastern markets. Weather across the mid-west and northeast has been very winter-like with rain and snow, slowing demand dramatically. Expect good supplies of pepper for the next couple of weeks.



Commodity Updates



BELL PEPPERS (WESTERN)

Green Bell- Green bell peppers are being Harvested in three different growing regions this week. Growing areas include the Coachella Valley in California, and the Mexican states of Sonora and Sinaloa. Weather in California is expected to be good for the remainder of the week. Green bell pepper quality from domestic bell pepper is good. Green bell pepper crop being harvested in Sonora are expected to finish early due to heavy rains in the growing areas these past two weeks. Due to excessive rain quality from Sonora quality is poor to fair at best. The biggest issue being seen is wet stem and turners. Light supplies have also started from Sinaloa. As a result of the same rains, production from this region has been pushed back up to 3 weeks. The market on green bell pepper this week is inconsistent with the range of quality out there. Moderate supplies of green pepper also available to load McAllen, Texas.

Red Bell- Red bell peppers are currently being harvested in the Coachella valley in California and in the Mexican state of Sinaloa. Light supplies are being packed from both regions on red bell pepper. Quality from both crops is currently good. The market on red bell pepper are currently steady on both varieties. Hot House crop from Sinaloa is expected to increase as soon as next week. Open field variety from Coachella California is expected to finish within three weeks. Hot house red bell pepper in San Diego have finished for the season this week. Light supplies of Red bell pepper are also available to load in McAllen, TX.

Yellow Bell-Moderate supplies of Yellow bell pepper are being in harvested in Mexico from Sinaloa. Light supplies of yellow bell pepper being harvested in the Coachella Valley. The Market on Mexican yellow bell pepper has decreased due to better supplies. The market on domestic yellow bell pepper have increased due to lighter supply. Quality from both districts is good. Light supplies of Yellow bell pepper are also crossing through McAllen, Texas.



BERRIES (BLACKBERRIES)

Blackberry production has increased dramatically out of Central Mexico leaving easier markets in the U.S. as a result. Volume deals are being taken and some product is still showing the occasional red cell defect. Look for the markets to remain flat as we work through this temporary glut of product.



BERRIES (BLUEBERRIES)

Blueberries remain readily available in all distribution areas. Highly promotable volume is expected through December. Quality has been good on Mexican, Peruvian, and Chilean fruit arriving in the U.S. Look for markets to remain flat for the upcoming weeks ahead.



BERRIES (RASPBERRIES)

Raspberry production out of Central Mexico and Baja has increased sharply and promotable supplies are expected for the next few weeks. The market remains soft while shippers offer volume deals to help manage the increase in numbers. Quality has been good with the odd quality issues arising mainly due to improper rotation of the growing inventories. Look for this numerical trend to continue through December.



BERRIES (STRAWBERRIES)

The strawberry market is still in a demand exceeds supply situation in all areas. There is clear weather with a slow warming trend expected through the end of this week in Southern California which should help. Numbers will still be tight in Santa Maria and Oxnard as many shippers are still working through the residual effects of our recent rainfall. Quality out of California will show white shoulders with some soft bruising and water issues. Mexico should begin to cross more fruit as we move into next week as Mexican growers send their fruit north to capitalize on where the profits are. The quality has been reported as good coming through the Texas area. Florida fruit is beginning to pick up in availability. Although sporadic, we look for those numbers to increase week by week providing some relief to our present shortage. Look for Markets to remain relatively firm through the end of this week.



Commodity Updates



BROCCOLI

The Broccoli market continues to stay steady as supplies have picked up in Yuma as well as Santa Maria and Oxnard. Quality has slightly improved with slight purpling, some mechanical damage, and occasional yellow cast. Look for Broccoli to continue to stay steady going into next week.



BRUSSELS SPROUTS

The brussels sprouts market continues to stay steady. There is still some internal decay causing slightly lower yields. Look for the Brussels sprouts market to continue to remain the same going into next week.



CARROTS

Carrot production remains steady on all pack styles. Jumbo production remains limited affecting Jumbos, carrot sticks and the whole peeled plug items. Shippers have issued statements that these items may contain raw product from Canada and /or Mexico. Labeling will state the countries of origin as is required by the USDA. Mexican jumbo production remains steady at lower pricing.



CAULIFLOWER

The cauliflower market continues to stay steady as supplies continue to come on in Yuma as well as Santa Maria and Oxnard. The quality is good with slight bruising and yellow cast with weights in the 25 to 28-pound level. Some suppliers may need to sub sizing to fill orders. Look for the market to continue to adjust going into next week.



CELERY

Overall, demand is steady. There are a few suppliers flexing. Shippers are expecting better production on small sizing, thirty-six counts in particular. With this being said, there is enough production to meet all demands. Southern California continues to be the main growing region for this commodity. Mexico has production as well. Shippers are consolidating product in Yuma for a fee. Yuma is expected to begin harvesting in 2-3 weeks pending weather. The quality continues to be reported as good, with weights being reported at 52-58 pounds. Only slight bowing and leafy tops have been reported as defects, and this has been minimal.



CHILI PEPPERS

Jalapenos- Good supplies of Jalapeno are being harvested in the Sonoran and Sinaloa growing district. Good supplies are expected to continue throughout the week. Quality from both districts is good. The Jalapeno market is decreasing with better volume. Jalapenos from Mexico are also available to load in McAllen, Texas.

Pasilla- Good supplies of pasilla crossing through Nogales this week. Quality on pasilla crossing through Nogales is good. Size on the pepper is mostly medium to large. The pasilla market is steady this week with better supplies. Pasilla from Mexico also available to load in McAllen, Texas.

Anaheim- Good supplies of Anaheim crossing through Nogales this week. Quality on Anaheim crossing through Nogales is good. Size on the pepper is mostly medium to large. The Anaheim market remains steady this week with better supplies. Anaheim from Mexico also available to load in McAllen, Texas.

Serrano – Good supplies of Serrano peppers available to load in Nogales, Mexico. Supplies are expected to remain light throughout the week. Supplies currently meet demand. Serrano supplies are also crossing through McAllen, Texas.

Tomatillo – Husk tomatillos are available to load in Nogales, Mexico. Quality of husk variety is good. Good supplies on husk tomatillos are expected to continue. Market on both peeled and husk tomatillo is steady. Both husk and peeled tomatillo are available to load in McAllen, TX.



Commodity Updates



CILANTRO

The cilantro market continues to stay steady as supplies continue to be plentiful. The cilantro quality is fair with an occasional yellow leaf. Look for the cilantro market to continue to stay steady going into next week.



CITRUS (LEMONS)

The district 3 (desert crop) is winding down for the season and supplies out of District 1 (Central Valley) are coming along nicely. The sizing profile is peaking on 140's and 165's with a 70/30 ratio from fancy to choice. The large sizes of 75/95 are still snug but are projected to be more readily available after the New Year. We can continue to expect good supplies with steady markets and good quality through the month of December.



CITRUS (LIMES)

Large size limes look to have better availability while the smaller fruit is starting to get limited. The growing region of Veracruz is lacking rain and needs more rain for supplies to turn back around. Crossings have been steady and the overall quality has been consistent. We expect pricing to be active through the month of December.



CITRUS (ORANGES)

Navel supplies are looking to be in better shape this week in the Central Valley. Despite the amount of rain we've had last week our suppliers are looking good and packing ahead before the next storm coming this weekend. The Navel demand continues to be steady and all arrivals have been received with good feedback. Our suppliers are staying focused on pushing volume. Sizing profile is peaking on 88's and smaller. Brix levels have been consistent between 11.5% – 12.5% with good quality. On specialty citrus keep pushing mandarins because quality has been solid and markets have been steady. Grapefruit supplies are steady and Cara Cara's should be in better shape this week. Blood Oranges and Orlando Tangelos should be starting late this week. Supplies will be light to start but should gradually increase over the next week.



CUCUMBERS (EASTERN)

Cucumber supplies are very tight and will remain tight throughout the week. Florida is past its peak and starting to wind down for the season. There was less acreage planted in Florida this fall and with the sporadic weather the region received, shippers never seemed to have a peak. Most Florida shippers will continue through the end of December with light volume. The first Honduran imports arrived this weekend, it will take a few weeks to hit peak season. Only a few growers have begun harvesting, the rest will start by the fourth week of December. Quality reports on the first shipments of Honduran cucumbers are very good. Quality on Florida cucumbers is good with most shippers, but there is some scaring from high winds last week. Pricing has been very high and we do not expect any relief this week but growing conditions are good in South Florida and Honduras which could help supply issues by early next week.



CUCUMBERS (WESTERN)

Moderate supplies of cucumbers are crossing through Nogales from Mexico. Cucumber supplies are steady this week. Supplies on retail pack have decreased this week, while more off-grade packs are available. The market on all cucumber packs are expected to remain steady through the week. Moderate supplies of Mexican cucumbers are also crossing through McAllen. Quality from McAllen is being reported is fair.



EGGPLANT (EASTERN)

Eggplant supplies are very good. Georgia is about done packing and some coolers still need to be cleaned out, which will happen over the next couple of days. Florida is hitting its peak this week and next, although there is not a tremendous amount of eggplant grown in Florida this time of year. All districts are harvesting and demand has declined since the Thanksgiving Holiday. Quality is good with most shippers in Florida. Quality in Georgia is not bad but most of the product is a choice grade. We expect good supplies to continue for the next two weeks.



Commodity Updates



EGGPLANT (WESTERN)

Good supplies of eggplant continue to be available to load in Nogales, AZ. Eggplant crossing through Nogales is being harvested in Sinaloa. Both 18ct and 24ct being packed on all pack styles. Quality is good on eggplant crossing through Nogales.



GRAPES (GREEN)

Domestic: As expected, we are seeing an earlier than normal end to the domestic green grape season. As a result of the unfavorable weather we experienced early in the season, green grape supplies are limited and the quality is fair at best. Shippers are holding onto “good quality” storage crop to cover commitments. The open market fruit is a dice roll. Although the quality looks good in storage, it will diminish quickly upon traveling and arrival. Shelf life is low and we are seeing reports of wet berries, dark color, mold, and decay. As is the case in these situations, the market price on green grapes is climbing quickly. I would suggest moving into import fruit as soon as possible, but expect to pay even higher prices for new fruit.

Import: Arrivals of Peruvian green grapes are increasing weekly. We have availability on both the east and west coasts. The quality is looking excellent with good color, big berries, and crunchy texture. Unfortunately, the price difference between domestic and import fruit is still \$10-12. Due to the limited supply situation and quality concerns on domestic fruit, shippers are holding their prices on import fruit very high and firm. That being said, volumes of import fruit are increasing rapidly and at some point, the market will have to adjust down to move fruit. I expect that to happen over the next 2 weeks.



GRAPES (RED)

Domestic: According to the USDA storage crop report, there are approximately 5 million cases of red domestic grapes left in storage as of 11/30/19. Based on this info alone, it would appear we have plenty of storage red grapes to fill demand through the end of the month. However, the question is, will the quality hold? We have seen increasing numbers of troubles on storage reds over the last week. Reports of wet berries, mold, and decay have been prevalent. I am working with shippers to ensure we only get the best pick of the inventory, but my concern is the grapes do not have a strong shelf life and do not travel well. Unfortunately, the import volume on Peruvian reds has been extremely limited and the industry simply does not have enough fruit to fill demand. Because of this, we will have to continue to utilize storage crop for the next couple of weeks until heavier volumes of imports show up. Our goal is to transition into Peruvian reds as soon as possible. Markets on domestic red grapes have been climbing slowly and are firm.

Import: Peruvian red grapes are slowly arriving on the east coast. Volumes are still limited. Market prices are very high and there is about a \$10 disparity between domestic and import. Sizing is limited with mostly XL and Jumbo available. Supplies are spotty and shippers are selling out quickly. Because of inconsistent arrivals, we will see availability change from day to day. Quality is being reported as very strong. We expect volumes to slowly increase over the next 2-3 weeks. Again, most of the fruit is being sold off the east coast with very little availability on the west coast. However, that will improve as we look toward January.



GREEN ONIONS

The green onion market continues to stay steady with consistent supply in the pipeline. Quality is good with occasional leaf minor. The market will continue to stay steady going into next week.





KALE

The kale market remains steady as supplies continue to stay plentiful. Quality is good with full bunches and an occasional yellow leaf being reported due to the recent warm weather.



LETTUCE ICEBERG

With the holiday pull, now officially over, the market on lettuce is softer. Shippers have moderate supplies and this looks to continue for the rest of the week. As always, some suppliers are better off in terms of production than others. This is simply the norm in this industry. Production in Santa Maria is light. The major production continues to come out of the Yuma region. The overall quality has been better with weights averaging 36-40 pounds on wrap lettuce. The sizing and quality have been much more consistent. Some common defects being reported to include mechanical, and misshapen head sizes. These defects have been less however compared to past weeks.



LETTUCE LEAF

The romaine market is softer. Multiple shippers have begun this week by making more offers available for volume type orders. There are a few shippers flexing. Others continue to have only moderate supplies and are firm. Expect to see this pattern throughout the week. Weights on romaine are reported between 32-36 pounds in Yuma. Santa Maria has had similar weights as well. Some common defects being reported on romaine to include fringe burn, mechanical and insect damage. Green and red leaf have had similar defects reported as well. Weights are reported at 19-23 pounds on green and red leaf. Expect moderate to good supplies for the rest of the week. Demand is expected to be up and down.



LETTUCE TENDER LEAF

The Tender Leaf market continues to stay steady with consistent supplies. Curly parsley, spinach, and arugula are now at a steady supply going into next week. Quality is good with occasional yellowing and bruising of the tender leaves.



MELON (CANTALOUPE)

Offshore-

Arrivals continue to gain momentum week in and week out. Guatemala is showing a massive increase in crossings year over year into Florida. Cantaloupes are up 63% and honeydews are up 96%. Come January, Costa Rica and Honduras will ramp up production and growers are anticipating solid yields. The size curve on offshore fruit is leaning heavily on larger sized fruit. Small fruit will remain limited for the rest of December. Quality is up to par internally and externally.

Mexico-

Honeydews out of Mexico have been hindered on both quality and yields due to weather. However, Supplies and quality should improve weather permitting. The size curve is geared towards larger fruit. Small honeydews out of Mexico are very limited. There is a new district ramping up in the growing region of Guerrero. New crop fruit should hit the US by next week.



MELON (WATERMELON)

Light supplies of watermelon continue to be harvested in Sonora, Mexico. The seedless watermelon market continues to be steady this week. Watermelon quality from Sonora is good. Mostly cartons are being packed from this district.



ONIONS

Onion markets are in good supply in all regions. Markets are holding steady with the exception of medium size onions that are the prime focus for retail holiday demand. Idaho and Oregon continue to produce excellent quality yellow, red, and white onions with plentiful storage supplies. Availability can also be found in Washington, Utah, and Colorado. We are in peak season for storage onions and look to be in great shape as we finish up 2019 and look forward to 2020.



Washington:

Smaller shippers will be done in December with Bartlett pears, leaving larger shippers left to shoulder volume through the first week of January. Currently, all three flavors (Bartlett, Anjou, and Bosc) remain available with Bartlett/Bosc pears commanding higher prices over the cheaper, longer shelf-life Anjou.

Red pears – Red Anjou is the variety and is packed in 1/2 and full cartons. Markets are steady and quality is excellent.

Specialty varieties such as **Seckel, Forelle, Comice,** and **Asian** are still available, but most shippers are done packing and inventories will be depleted early to mid-January. Quality is good.



Pineapple supplies continue to be steady out of both coasts. Markets remain fair, and demand seems to be light for the third week of December. Please be sure to send orders over in a timely manner to account for heavy demand-pull for this time of year. Quality has been consistent and looking good!



Russet potato markets continue to inch up on larger size 40 count through 70 count as well as 10oz #2's as more suppliers move into Burbank storage potatoes. The Burbank crop is showing an overall smaller size profile and will prove to be a challenge as we head into the holidays and the 2020 storage crop. Growers are now reaching into cellars that were harvested right before, during, and after the snow-storm back in October to salvage any supplies available for fresh market. This is producing a much smaller size profile across the board in Idaho along with some lots showing peepers (picture attached) due to the lack of sprout inhibitor used in these short term cellars. As we head into the upcoming Christmas and New Year holidays, expect rising markets and limited supplies of larger size potatoes. We highly recommend 5-7 business days lead time prior to ship date to ensure proper coverage and on-time deliveries.



Color potato markets continue to hold steady as storage supplies from several regions are in full swing. Idaho, Washington, North Dakota, and Wisconsin are producing red and yellow potatoes; Minnesota has finished for the year. Mt Vernon, Washington has excellent quality and will have supplies into March. Bakersfield, CA is using Mt Vernon product to ship out of California to supplement West Coast orders. We expect to see steady supplies of color potatoes through December and will evaluate the overall supply in January as the regional areas of North Dakota and Wisconsin will make an early exit this year due to the heavy crop loss from the October snowstorm.



Squash is in very good supply with all regions in Florida harvesting steady volume. Cold temperatures throughout the state slowed production for a few days but did not have the impact that many thought it would. Quality with most shippers is very good but there is some scaring on yellow squash from windy conditions last week. Green squash is producing better than yellow straight neck and quality is generally better than zucchini which is typical this time of year. Scattered showers are forecasted in south Florida for the next few days which could slow harvest for the week-end but temperatures will be warm and squash should continue to produce well. Mexican imports have picked up over the past week putting pressure on eastern markets. Expect supplies to remain steady for at least the next week.



Better supplies of Italian and yellow squash crossing through Nogales this week. Due to recent rains in both Sonora and Sinaloa the quality is mostly fair. Soft squash crop from Sonora is expected to finish early and crop from Sinaloa is expected to start later by up to 3 weeks. Soft squash quality is mostly fair this week from both Mexican regions. More quality issues are being seen on Yellow S/N. Wind scarring on yellow squash is breaking down quickly. Market on Italian squash is mostly steady in the low teens while the market on Yellow S/N remains in the high teens this week. Light supplies of soft squash continue to cross through McAllen, TX.





STONE FRUIT

We are in the middle of transition. We are expecting the first arrivals of Chilean stone fruit to land on the east coast later this week. Limited volumes of peaches and nectarines are expected to be available by the weekend. We anticipate seeing fruit available on the west coast by next week. Plums are expected to start in January. Prices are coming out in the high 20's on the first arrival but will start to trend down as more fruit arrives over the next 2-3 weeks.

TOMATOES (EASTERN)

Florida tomato production is amidst transition with some growers finishing this week in Palmetto/Ruskin, with others started already further South in Naples/Immokalee, spreading out production. Mexico has been devastated by weather causing a gap in the west during their transition forcing national demand to Florida where supply is already lighter than normal, partially due to heat affecting crops weeks back during the fruit set portion of the growing cycle. As a result, markets have taken off and jumped again this week. Round and Roma tomatoes have breached the \$30 FOB mark and may continue upward. Even higher, Bulk Grapes are so few that FOBs are approaching \$40 this week. Similarly, cherry tomatoes are also rising to meet demand as buyers look for an alternative to grape tomatoes. The next 10 to 14 days are expected to be very tight markets until Mexico begins winter programs crossing Nogales near January.

TOMATOES (WESTERN)

Devastating rains in Mexico have ended operations early for some farms and delaying the start of others causing a supply gap as farms work to recover operations and assess storm damage. Chihuahua, Sonora, Baja, and Sinaloa where a state of emergency has been declared and have all been affected. As Mexico works to get back on track, crossings are extremely light. Flood damage has wiped out field production and damaged shade houses where the lasting effects of precipitation will affect quality for weeks to come. Western demand has shifted to Florida where supply is also light causing the market to move up quickly. National demand exceeds supply. Growers have asked for leniency when evaluating quality considering the amount of volume coming across. Prorates can be expected as harvests and markets adjust through the Holiday season.



Commodities at a Glance



Commodity / Region	Market	Quality
Apples		
Hudson/Pleasant Valley/Red Hook, NY	Lower/Steady	Excellent
Marlboro, NY	Lower/Steady	Excellent
Peru, NY	Lower/Steady	Excellent
Aspers/Gardners, PA	Lower/Steady	Excellent
Coopersville/Belding/Sparta, MI	Lower/Steady	Excellent
Wenatchee/Yakima, WA and Hood River, OR	Lower/Steady	Excellent
Asparagus		
Ica, Peru to Trujillo	Steady	Good
Cuidad Obregon, Mexico	Steady	Good
Northern Baja California Norte, Mexico	Steady	Good
Avocado (Mexican)		
Michoacan, Mexico	Steady/Higher	Good
Bell Peppers (Eastern)		
Hillsborough / Western Collier County, FL	Lower/Steady	Good
Indian River / Dade County, FL	Lower/Steady	Good
Bell Peppers (Western)		
Coachella Valley, CA	Steady	Good
Central Sonora, Mexico	Steady	Fair
Northern Sinaloa, Mexico	Steady	Good
Berries (Blackberries)		
Central Mexico	Lower/Steady	Poor
Berries (Blueberries)		
Central Mexico	Lower	Excellent
Southern Chile	Lower/Steady	Excellent
Trujillo, Peru	Lower/Steady	Good
Berries (Raspberries)		
Central Mexico	Lower	Good
Baja, Mexico	Lower	Good
Berries (Strawberries)		
Santa Maria, CA	Steady/Higher	Fair
Oxnard, CA	Steady/Higher	Good
Central Florida	Steady/Higher	Good
Central Mexico	Steady/Higher	Good

Commodity / Region	Market	Quality
Broccoli		
Oxnard/Santa Maria, CA	Steady	Good
Yuma, AZ	Steady	Good
Brussels Sprouts		
Oxnard, CA	Steady	Good
Carrots		
Bakersfield/Santa Maria, CA	Steady	Excellent
Cauliflower		
Oxnard/Santa Maria, CA	Steady	Good
Yuma, AZ	Steady	Good
Celery		
Oxnard/Santa Maria, CA	Lower/Steady	Good
Chili Peppers		
Northern Sinaloa, Mexico	Steady	Good
Cilantro		
Oxnard/Santa Maria, CA	Steady	Good
Yuma, AZ	Steady	Good
Citrus (Lemons)		
Coachella, CA / Yuma, AZ	Steady	Good
Merced/Bakersfield, CA	Steady	Good
Oxnard/Ventura, CA	Steady	Good
Citrus (Limes)		
Veracruz, Mexico	Steady/Higher	Good
Citrus (Oranges)		
Merced to Bakersfield, CA	Steady	Excellent
Riverside, CA	Steady	Excellent
Cucumbers (Eastern)		
Hillsborough / Western Collier County, FL	Steady/Higher	Good
Indian River / Dade County, FL	Steady/Higher	Good
Olancho, Honduras	Steady/Higher	Excellent
Cucumbers (Western)		
Central Sonora, Mexico	Steady/Higher	Good



Commodities at a Glance



Commodity / Region	Market	Quality
Eggplant (Eastern)		
Indian River / Dade County, FL	Lower/Steady	Good
Hillsborough / Western Collier County, FL	Lower/Steady	Good
Eggplant (Western)		
Northern Sinaloa, Mexico	Steady	Good
Grapes (Green)		
Delano, CA	Higher	Poor
Fresno, CA	Higher	Poor
Coquimbo/Valaparaíso/Santiago/Rancagua, Chile	Higher	Excellent
Grapes (Red)		
Delano, CA	Higher	Fair
Fresno, CA	Higher	Fair
Coquimbo/Valaparaíso/Santiago/Rancagua, Chile	Higher	Good
Green Onions		
Mexicali, Baja	Steady	Good
Kale		
Yuma, AZ	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Lettuce Iceberg		
Oxnard/Santa Maria, CA	Lower	Good
Yuma, AZ	Lower	Good
Lettuce Leaf		
Oxnard/Santa Maria, CA	Lower/Steady	Good
Yuma, AZ	Lower/Steady	Good
Lettuce Tender Leaf		
Yuma, AZ	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Melon (Cantaloupe)		
Zacapa, Guatemala	Steady/Higher	Good
Hermosillo, Mexico	Steady/Higher	Fair

Commodity / Region	Market	Quality
Melon (Watermelon)		
Southern Sonora, Mexico	Steady	Good
Onions		
Ontario, OR to Nampa, ID	Steady/Higher	Excellent
Quincy/Hermiston, WA	Steady/Higher	Good
Pears		
Wenatchee/Yakima, WA and Hood River, OR	Steady	Excellent
Pineapples		
Heredia, Costa Rica	Steady	Good
Retalhuleu, Guatemala	Steady	Good
La Virgen, Costa Rica	Steady	Good
Potatoes		
Hamer/Rupert, ID	Steady/Higher	Good
Quincy/Hermiston, WA	Steady/Higher	Good
Wray, CO	Steady/Higher	Good
Plover/Bancroft, WI	Steady/Higher	Good
Potatoes (colored)		
Mount Vernon, WA	Steady	Excellent
Pasco/Tri-Cities, WA	Steady	Good
Rupert to Rexburg, ID	Steady	Good
Red River Valley, ND	Steady	Good
Plover, WI	Steady	Good
Squash (Eastern)		
Dade / Eastern Collier County, FL	Steady	Good
Lee/Grady/Echols County, GA	Steady	Good
Squash (Western)		
Central Sonora, Mexico	Steady	Fair
Stone Fruit		
Coquimbo, Valaparaíso, Santiago and Rancagua, Chile	Higher	Excellent
Tomatoes (Eastern)		
Southern Florida	Steady/Higher	Good

