

Weather Update:



A large storm system moving into the Pacific Northwest will bring moderate rainfall to the Salinas Valley today into Thursday morning. Another system looks to bring more rain mainly to the north valley early next week. A slight cool down and breezy conditions are expected in Southern California as these systems pass to the north. A persistent high-pressure system over northern Mexico will keep the region warm and dry into next week. Florida will see mostly dry conditions with a slight cool down heading into the weekend into early next week.

Avocado:



Mexico's shipments to the US continue with good volume and it is expected to maintain at these current levels. We are seeing good supplies on 60s/70s and improving supplies on 48s/40s, but strong demand for 40s/40s is keeping these limited. Supply conditions will continue to improve and catch up to demand as we move through the month.

Apples:



California, they have finished the season. Washington, Red Delicious are steady on all sizes with better availability now. Red Delicious are peaking in the 80/88/100/113 range. Golden Delicious are steady with good availability and they continue to peak on Premium grade 100/113s. Granny-Smiths are steady on all sizes with mostly small fruit. 88 and larger Granny-Smith remain short & are still premium priced. Galas are steady on all sizes and are peaking on 100/113s. Fuji's are steady and are peaking in the 88/100 range. Honeycrisps are steady to lower on all sizes with good availability. They continue to peak on large fruit. Jonagolds are steady and still producing mostly 72/80/88s. Braeburns are steady & peaking on 88/100s. Quality of all varieties has been good. Idaho, continue packing Jonathans, Jonagolds, Golden delicious, Red Romes, Red delicious, and Granny-smith. Granny's & Jonagolds are peaking on 80/88/100s and the others are peaking on 88/100/113s. Most varieties are reasonably priced and have good color. All markets are being quoted as steady, but the demand has been light. The quality has been good. Michigan, Michigan continues to pack Galas, Honeycrisps, McIntosh, Jonathans, Jonamacs, Golden Delicious, Red delicious, Cortland's, Empires, Fuji, red Romes, Ida Reds, and Jonagolds. Most have excellent quality with good color. The color is so good that they are holding stronger on many markets but due to lighter tray-pack demand some varieties are lower. The quality has been good. Pennsylvania, Galas, Fuji, red delicious, and Golden Delicious remain steady. Red Delicious are still peaking on 88/100s, while the golds, Galas, and Fuji are heavier to 100/113s. The demand has been light due to local apples in many states. The quality has been good for all.

Berries:



Blackberries: Blackberry supplies are gradually starting to improve as Mexico increases harvest. Moving forward, all the Mexican fruit will only be transferred to southern California, Yuma, and Texas loading location. We will need to transition all blackberry orders to one of these locations.

Florida will have product transferred and available to load (with notice) in 2-3 weeks.

Quality of the Mexican fruit has been good with occasional red cell and soft fruit being reported. In southern California, Lompoc / Oxnard harvest is increasing over the next 2 weeks and quality is good. Market prices have been steady in all areas. ***Blueberries:*** Blueberry supplies remain fairly limited with our mixed berry shippers on the west coast. Uruguay was hit with devastating rain and hail storms that has wiped out most of the remaining forecasted production. This will affect some shipper more than others, but may have an impact on the industry in term of supplies. The good news is, Mexico's production continues to increase, & we expect more arrivals of fruit from Peru and Argentina to arrive next week. Other loading locations on the east coast have better availability. Quality overall on the import blueberries that do arrive has been good. Market prices have been steady and firm. Chile is expected to start shipping fruit over the next couple of weeks with first arrivals expected to arrive by boat mid-November. ***Raspberries:*** Raspberry supplies have been consistent this week. However, as most of harvest is coming from Mexico, the fruit will only be transferred to southern California, Yuma and Texas loading locations. Northern California loading locations are quickly winding down and we will need to load mixed berries down south. Florida will have product transferred and available to load (with prior notice) in the next 2-3 weeks. Quality on the Mexican fruit has been fair. We have seen reports of soft and wet berries over the last week and shippers are working on improving quality moving forward. In southern California, Lompoc / Oxnard fruit has been reported as decent quality and supplies are expected to improve over the next 2 weeks. Market prices have been steady without much change in all areas. ***Strawberries:*** Strawberry supplies are expected to be limited through the weekend and into the front part of next week. The weather forecast calls for a chance of rain in all growing regions. Salinas and Watsonville are expected to receive the greatest amount of rain, which could leave some growers out of production for the weekend & possibly bring a premature end to the season for others in these areas. Santa Maria and Oxnard do not expect rain very much, if any. This will help keep supplies consistent from these areas, but yields are still lower than anticipated and availability will be light. Overall the quality has been steady with some of the residual impacts of the heat wave last week still present. I expect Santa Maria and Oxnard to continue to improve, but Salinas may suffer depending on how much rain falls. Market prices are expected to be active into next week with increases in all areas. Mexico production is increasing, and product will be available to load in McAllen, TX. If this is an option, we will have several shippers with fruit available by the weekend. Florida is on schedule to start production in the next 3-4 weeks.

Grapes:



Green: Green grape season continues moving along. We will see shippers start ending harvests in November. Market has reacted accordingly and has firmed up. Expect the market to remain firm for the rest of the domestic season. Quality remains very nice. ***Red:*** Much like the green grapes, red grapes will start to end harvests in November. Shippers have started to hold back inventories & markets have risen accordingly.

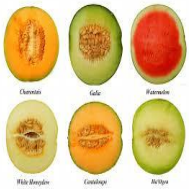
Deals on volume are available on both red & green grapes Quality continues to be very nice.

Citrus:



Lemons: The Oxnard/Ventura crop is nearing its seasonal end. Fruit out of this district is peaking on 165's and smaller. The Desert crop is improving in supplies build in availability as we move into November. Fruit from this district is peaking on 140s/115s, heavier to the fancy grade. Imported fruit from Chile is starting to clean up as their season nears its end. Mexico is in good supplies. **Limes:** Limes remain steady in supply and quality this week. The weather has improved, and we expect to have consistent supplies for next week as well. All sizes are available with good continuity throughout the pack. Demand has been steady. Market prices have remained steady this week with a very slight increase depending on the shipper. **Oranges:** California Navel crop production is improving and will continue so over the next 2 weeks, weather permitting. Most all packers have now going. This year's crop is the smallest since 2009, projected to be 15% lighter than last year's light crop. Packers will be pacing out their weekly pack to stretch out the crop into May. This looks to be a difficult Navel season. Fruit is clean, and harvest is producing mostly Fancy grade fruit and very little choice fruit. Demand remains very good, and the demand for choice grade fruit exceeds supplies.

Melons:



Cantaloupe: Domestic cantaloupe continues with 3 areas going now Southern California Desert, Maricopa AZ, and Nogales, AZ. Supplies are good on smaller sizes with limited amounts of larger sizes. As such, bigger fruit is higher priced with smaller fruit being lower priced. Quality has been good. Offshore supplies should start arriving mid to late November. Please get winter melon contacts in if you haven't done so. **Honeydew:** Domestic honeydew production also continues with the same 3 areas going now - Southern California Desert, Maricopa AZ, and Nogales, AZ. Supplies are good on most sizes. Quality has been good as well. Offshore supplies should start arriving mid to late November. Please get winter melon contacts in if you haven't done so. **Watermelons:** Volume on new crop melons in Nogales crossing from Mexico has increased. More Nogales shippers have started to receive steady volume on this commodity. This should have an impact on the market. Demand and supply is steady. Quality on Mexican watermelons is mostly good to excellent.

Pears/Pineapples:



Stockton, California, Pears are essentially finished for the season. Washington, Bartlett pears are steady on all sizes however small fruit is short. The Bartlett pears are peaking on US#1 80/90/100s and the fancy grade is limited in all sizes. Bosc & D'Anjou are both similar. Both are still peaking on US#1 grade fruit and 80/90/100 sizes with only light supplies of the fancy grade. Small fruit is limited in both. Red Bartlett's/Red Sensations remain steady on all sizes and continue to peak on 45/50 half cartons. The quality for all has been good. New York, they are still packing Bosc bins but supplies are light, they will finish right after Thanksgiving. **Pineapples:** We continue to see good supplies coming in for the tropics. Expect good supplies as we move through November. Size is peaking on 5ct/6ct with the smaller sizes limited.

Vegetables:



Asparagus: Southern Baja production is starting to decrease due to seasonality. Warm weather in the region will continue through next week which will not help quality. Northern Peru (Trujillo), & Southern Peru (ICA) are both in full production, and the weather is helping the growth of the larger sizes. Market is better this week with the anticipation of Thanksgiving AD's starting next week. **Bell Peppers:** Green Bell's volume is steadily increasing in Coachella. After a couple of weeks of very light supplies, the market is beginning

to level off. There are also a few green bell peppers loading out of Mexico, in Nogales. Supplies should remain steady for the next few months as Mexico begins the fall and winter harvest. Market remains strong, especially on the retail sizes and packs. Market should settle as we move into higher volume on the west coast. Red and Yellow Bell Pepper supplies remain light. Very few supplies in Gilroy & Oxnard, Coachella is still two to three weeks away from harvesting fruit. Very light supplies on hot house variety colored bell peppers available from Mexico, in Nogales. Market should remain strong until Coachella reaches peak volume **Broccoli:** The broccoli market is firming up with light but steady supplies and increased demand in all regions. Quality is generally good with some hollow core being reported on the Mexican product crossing through McAllen. We are seeing some appearance issues such as purpling, cat eye and knuckling in a few lots out of the Salinas and Santa Maria regions. We expect this market to remain strong as Salinas volume winds down and the desert regions slowly come on. **Brussels Sprouts:** Brussel Sprout supplies are steadily increasing. As we approach November, we will see increased demand for Thanksgiving. We typically see temperatures drop significantly but that shouldn't alter supplies. The market is trending lower as well. We are still seeing excellent quality out of Salinas with dark green color, full sizes, and minimal insect damage.

Cauliflower: The cauliflower market is demand greatly exceeds supply as Salinas finishes and the desert has yet to start. Quality is generally good with sizing running towards the 12's and 16's. Unseasonably cool weather in the Salinas and Santa Maria regions means this trend is likely to continue. Cauliflower supplies should improve slightly as shippers begin harvesting out of the Yuma area around the end of this week. **Celery:** This market has leveled off as demand has fallen off slightly. Good supplies continue in northern as well as southern California. There should be an upward swing in this market as we get closer to Thanksgiving. The best deals will come this week so take advantage of it if possible. Oxnard and Santa Maria have good supplies available. Salinas is moderate and meeting all demands. The overall quality continues to be strong. **Cilantro:** Cilantro supplies vary from shipper to shipper. Also, the market varies depending on the loading location. We have seen improved quality although the weather has taken its toll on this commodity. We are seeing sporadic yellowing and brown leaves. But overall quality we are seeing is full bunches and minimal dehydration.

Cucumbers: Cucumbers available to load in Nogales from Sonora, Mexico. Supplies from Baja are way down. The volume will continue to increase steadily in Nogales, quality is mostly good. Demand is fair to strong, as volume seems to be concentrated on the West Coast. Barring any weather issues, cucumber production should remain consistent through the holidays. **Eggplant:** Eggplant supply in Coachella is very light. There is choicer grade to offer as high winds in the growing area have caused some scarring issues. There is also eggplant from Mexico available to load in Nogales. Supply from Mexico is still very light, and the market is strong. Quality on fancy grade is good in both districts. Volume in both growing areas is expected to increase in the next 7-10 days and the market should stabilize

Market Report

Vegetables

Lettuce:



Iceberg: This commodity is now being produced in four regions. Overall, the market is steady. Huron's production will continue through this week and then be evaluated next week. Yuma has production from multiple suppliers. Salinas and Santa Maria have been steady for the week. Weights in all areas have averaged 41-46 pounds. Defects that have been seen

include tip burn, mechanical, puffiness, ribbing, and slight insect damage. All defects have been minimal. Currently, supplies exceed demand. **Leaf:** Romaine as well as all leaf items are steady in the marketplace. This will likely continue for the entire week. Demand is off. Yuma has begun production & supplies will pick up next week. Salinas, as well as Santa Maria, have moderate to good availability. Strong quality continues with multiple shippers. The weather has been ideal for the most part. Slight mechanical insect and ribbing reported on romaine as well as green and red leaf as well as butter but only minimally. Romaine hearts are being harvested both north and south and this will continue throughout the week. **Tender Leaf:** The cooler nights and days have improved quality and the supplies left here in the Salinas Valley. Also, we have started raw product harvesting out of Yuma with very nice quality as well. The markets are back to a normal level with all tender leaf items. Supplies have finally moved to a normal level.

Onions:



Green Onions: Supplies from Mexico remain steady with both iced and iceless green onions. We have seen an improvement with quality as well. We have seen vibrant green tops and a full line of sizing. The market also remains competitive.

Onions: The onion market is relatively steady across all sizes and packs. Demand is good due to the Thanksgiving holiday coming up. They are shipping out of

Washington, Idaho, Utah, Colorado, and New York. The biggest issue is transportation or lack of. With limited trucks, be sure to stay ahead on your inventories. Quality is very good out of all areas.

Squash:



High volume available on Zucchini loading in Nogales, from Mexico. Supply should remain steady; November promotions could strengthen the market. Lighter volume on yellow and gray squash,

Potatoes:



Potato market is steady on cartons 40 through 60 counts with 70 counts and smaller higher.

Thanksgiving demand exceeds offering on retail bags out of all growing areas. Most shippers are putting most of their 80 counts and smaller into the retail bags due to the extra holiday demand for bags. Quality is reported as good. Transportation is very limited and demanding a premium. Snow in the areas is slowing movement of

the available transportation and causing them to haul lighter loads due to the snow and ice buildup on the trailers. With limited trucks, be sure to stay ahead on your inventories. ***Color Potatoes:*** Eastern Washington, red and gold potatoes are steady, but supplies are light. They are mainly producing A size reds and golds. The quality is good. Western Washington, reds, whites, and golds are steady with good availability. All are peaking on A size and the quality is good. Bakersfield, California, red, white, and gold potatoes are steady on all sizes. The availability has been good but transportation down from Washington has been more of a challenge. All colors have been excellent quality. Idaho, red and gold potatoes are steady with good availability although there have been some volume deals out there. Both are heavy to A size and have had excellent quality. Wisconsin, red and golds potatoes are steady on all sizes. Both Trucks are slightly easier here. The quality has been good. North Dakota, reds, and golds are steady with good availability in both colors. Transportation has been the toughest thing to find. The quality is good.

Tomatoes:



There is essentially a shortage of tomatoes across North America. California has finished for the season and Baja has little to help the west and finishing soon. Mainland Mexico is between Fall and Winter crops, so volume isn't tremendous but helping overall supply in a big way since Florida production has been reduced significantly from Hurricane Irma storm damage. Most of the quality round tomatoes

in the west are Vine Ripes crossing San Diego and Texas borders. There are some mature greens available that are California grown from last week ripening in green rooms, but the quality is suspect from months of extreme temperatures in the valley growing areas. Roma tomato availability is probably the best of the tomato varieties with a majority if not all coming from Mexico. Roma tomatoes are elevated in pricing as well & the only category, east or west, to be under the \$20 mark today Grape and cherry tomato production remains light against rising demand pressing prices upward as well only helping to illuminate the shortage in Florida.