

Weather:



High pressure out west will keep the entire region from California to Northern Mexico dry with above average temperatures. Cold mornings in the Southwestern Deserts continue with widespread lettuce ice delaying harvests in this region. Central Mexico will see seasonal temperatures this week with increasing moisture bringing a chance of showers next week. In Florida a weak cold front move into the north with light showers into Thursday. A wet system moves into the region on late Sunday with moderate rain and much colder air behind this system.

Avocado:



Mexico had a strong harvest last week before the Christmas holiday. This week volume is expected to drop off due to the holiday, before ramping back up in preparation for the Super Bowl promotional pull. Size curve continuing to shift toward 48's/40's with the smaller fruit 60's/70's reducing in availability. We are see an increasing percentage of #2 fruit starting to come out of the harvest.

Apples:



Washington, Red Delicious, Golden Delicious, Granny Smith, Galas, Fuji's, and Honeycrisp have all been steady. The other varieties have been steady as well. Demand has been light, but we expect that turn after New year's. The quality has been good for all varieties and most have been peaking on smaller fruit. Reasonably priced transportation has been the hardest thing to find in the northwest. Idaho, Jonagolds, Golden Delicious, Red Romes, Red Delicious, Granny Smith, Fuji's, and Pink Ladies are all steady. Granny's and Jonagolds are still peaking on 80/88/100s while the others are peaking on 88/100/113's. The availability is light right now, but the demand has been light also. The quality has been good. Michigan, Galas, McIntosh, Jonathans, Jonamacs, Golden Delicious, Red Delicious, Cortland's, Empires, Fuji, red Romes, Ida Reds, and Jonagolds. All markets are steady. Michigan has excellent quality and good color this year. The quality has been good. Pennsylvania, Fuji, Red Delicious, Golden Delicious, Granny Smith, Cameos, and Pink Ladies are all steady. Red Delicious and Pink Ladies are peaking on 88/100s, while the rest are peaking on 100/113s. The demand has been light. The quality is good in all varieties. New York, they are packing Cortland's, Galas, McIntosh, Honeycrisp, Red Delicious, Fuji's, Snap Dragons, Golden Delicious, Jonagolds, Red Romes, Macoun's, Pink Ladies, Stamen Winesaps, and Empires. Most of their fruit is larger this year. All markets have been steady, and the demand has been light. The McIntosh and red delicious have been producing more small fruit lately. The quality has been good.

Berries:



Blackberries: Blackberry supplies are good this week. Production has improved in Central Mexico, and quality is being reported as strong. Demand has been steady. Market prices are slightly lower this week with volume buy opportunities available. Fruit is available to load in all locations. Despite the possibility of a delayed arrival from Mexico, do not expect any shortages of product for the next 2 weeks. **Blueberries:** Blueberries have been light this week and are expected to remain limited but steady through next week. Shippers expect better availability of Chilean fruit by the second week of January. Then supplies will ramp up as we move through peak Chilean production late January. Market prices have been higher and firm this week as fruit is still limited. We expect markets to fall gradually as we increase supplies through January. Central Mexico continue to be consistent on production and will slowly improve over the next 2-3 weeks. Quality in all areas has been good. Delayed arrivals & transfer trucks are our biggest challenge on order fulfillment. **Raspberries:** Raspberry availability is very limited this week. Central Mexico is the primary source of supply currently and we are dealing with multiple delayed arrivals due to heavy snow in Texas. The front part of the week was the lightest. However, as the transferred product arrives in California and Florida at the end of the week, we can expect better order fulfillment. Demand has been strong, and quality is good. Market prices are slightly up due to the limited supplies. We expect supplies to continue to be light over the next 2-3 weeks. **Strawberries:** We expect lighter supplies of strawberries this week. Due to the holiday, limited labor and last week's cold front, harvest has slowed down. Santa Maria was hit with some freeze late last week, although the weather has warmed up since then, yields have dropped due to cleaning the damaged fruit. Moving forward we expect quality to be fair as we are approaching the end of the fall crop season. Oxnard continues to improve in both volume and quality. We expect to see consistent supplies for the next 2 weeks until we get past the holidays, then increase starting the second week of January. Central Mexico will remain consistent in production with fruit crossing daily. Florida is expected to remain light until after the New Year Holiday, then increase production through January. Market prices have been steady in all location. We do not expect that to change until after the holidays, when production will ramp up.

Grapes:



Green: The seedless green grape market continues to be about steady. Chilean import volumes are increasing weekly as domestic supplies begin to decline. Quality is generally good on both and this has led to a rather flat market situation. We expect this to be the case for the next several weeks as the domestic fruit cleans up. **Red:** The red seedless market is firming up as the domestic supplies clean up. Quality on the domestic reds has been spotty with many lots showing some issues (soft berries, shatter, some mold). The import red grapes have been able to maintain a firmer market price as quality has been much better than what we see on the domestic fruit. This market looks to be unchanged through most of January as supplies of domestic fruit disappear and import volume ramps up.

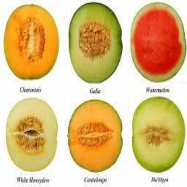
Citrus:



Lemons: The lemon market is very active.

Demand continues at a strong pace and is exceeding supplies. With this year's Desert crop much lighter in volume, shipper's production starting to fall off as they look at a premature end of them season. The Central Valley crop has just begun to harvest, and pack limited volume, mostly fancy grade. Ventura crop will not start until the end of February. Demand is exceeding supplies on 140s and smaller fruit, and will so through January and into February. **Limes:** Lime supplies remain steady this week. Quality is being reported as good & market prices are higher. However, biggest challenge with Limes is delivery options. Because most of our lime orders are delivered, we are experiencing some delays. Due to the holidays & recent regulation changes for truck drivers, it has been difficult to find reliable delivery options. All lime shippers are experiencing the same challenges & we are working together to find solutions. As we navigate through the next 2 weeks and move past the holidays, we may need to be flexible on delivery dates. **Oranges:** We are seeing peak sizing of 72s/56s/88s the Navel crop & the percentage of 113s/138s continue to fall off in pack outs. Pack outs are clean with good color resulting in grade ratio of 85% to 90% of Fancy fruit, leaving much less choice fruit than there is demand for of the choice grade. Choice market remains active and short. We are looking at peaking 72s/88s/56s for the balance of the navel season. Small fruit will be in short, all season long.

Melons:



Cantaloupe: Light supplies of domestic cantaloupes are available in both California and Arizona, but they are finishing for the season. The import market is steady on all sizes on both coasts. The fruit remains large with mostly 9s/Jumbo 9s/12s with very few 15s and fewer 18s. Sizing will remain steady as Guatemala finishes and Honduras begins to harvest. The quality has been good. **Honeydew:** Domestic fruit is finishing in Arizona, but the little volume left is heavier to smaller fruit. We expect the domestic

supplies to finish soon. Imported fruit is steady on both coasts and the fruit are heavier to 5/6s with a few 8s. Sizing will remain steady with the finish of the principal areas in Guatemala and into Honduras. The quality has been good. **Watermelons:** Seedless watermelon production from Mexico is down, with cooler overnight low temperatures affecting the fall crop. Quality is still mostly good, and supplies are winding down quickly. The market is very strong on bigger sizes (4's and 5's). Winter crop is expected to start around mid - December from Jalisco and Colima, Mexico.

Pears/Pineapples:



Pears: Washington, Bartlett pears are steady on all sizes and the fruit is mostly large. Supplies of small Bartlett's & the fancy grade remains limited. D'Anjou are also steady and remain large. Small fruit and all sizes of the fancy grade are very short. Bosc pears are steady and are still peaking on US#1 80/90s. Bosc are short on small fruit and all sizes in the fancy grade as well. Red Sensation pears remain steady on all sizes and

are still peaking on 45/50 half cartons. The quality for all has been good. New York, they have finished for the season. **Pineapples:** We continue to see good supplies coming from the tropics. Supplies will lighten first 2 weeks of January, which is planned to allow farm workers the time off during the Christmas holiday.

Vegetables:



Asparagus: The season from Central Mexico (Ciudad Obregon) is almost

wrapped up with a very small number of fields still open. There will be a gap until Caborca, Mexico starts to cut fern the first week in January, and production starts the second week. Northern Peru (Trujillo), and Southern Peru (ICA) both have lower volumes this week with fields starting to close due to seasonality. Market out west has continued to rise with very little volume from Mexico. The market in the

east is also up with the west demanding more volume from Peru. **Bell Peppers:** Green Bell Pepper volume has picked up from Mexico. We have all sizes available, better weather in the region has given us better sizing for the crop. Cooler weather slowed production slightly after weeks of extreme heat, but the plants are healthy and have resumed normal production. The market is adjusting down, and demand is steady due to lower production on the east coast. Quality is mostly good, choice grade peppers available. Red & Yellow Bell Pepper supplies remain very light. Coachella has lower volume due to cooler weather & should be done in the next week or so. Still, light on hothouse variety colored bell peppers available from Mexico, in Nogales. Volume is increasing every day as more growers are ready to harvest. Field grown colored peppers will also be ready for harvest in the coming weeks.

Market should remain strong until volume peaks for all growers in the region, this is expected in mid to late January. **Broccoli:** We continue to see decreased supplies of broccoli from all growing regions.

The colder weather combined with acreage being so far ahead of harvesting schedules has created this current supply gap. The market has reacted & is trending higher. Although I do not see this market going to the levels we are currently experiencing with cauliflower. Quality remain nice out of all growing regions despite the decreased supplies. The crown size is smaller, but the color is the typical peak green color, with minimal spreading of the beads, and minimal dehydration. **Brussels Sprouts:**

Brussel sprout supplies are steady, although the much colder weather in the Salinas and Oxnard growing regions has affected the sizing profile. We are experiencing more supplies in the small to medium size range with little to no jumbo-sized Brussel sprouts. The market is competitive despite the size profile. Quality is good with vibrant green color with minimal defects. **Cauliflower:**

There is a wide range in the market this week with your better price deals out of the Santa Maria growing region. Supplies are still extremely limited out of the Yuma and Imperial Valley. This has kept the market at extremely volatile levels. We are still two weeks away from any better supplies. Our only hope is that demand falls off after the New Year's Day holiday to settle this market back to normal levels. Quality remains good with little to no bruising / brown spotting of the cauliflower, vibrant white color, and good weights in the 26 to 29-pound level. **Celery:**

The celery market is steady. Common defects include insect damage, bowing & slight mechanical. These defects have been minimal. All sizing is available. Demand is average at best. Some shippers are flexing, so please be aware. The best deals continue to be in Santa Maria/Oxnard. Supplies look to be steady for 2 weeks. Yuma production is moderate at best. **Cilantro:**

The cilantro market varies from supplier to supplier as well as loading region. Supplies have been limited as this market slowly trending higher. Quality is nice despite the market conditions. We are seeing full bunches, minimal yellow to brown leaves, & vibrant green color. **Cucumbers:**

loading in Nogales are mostly from Sinaloa, Mexico. The volume will remain steady in Nogales as cucumbers are now being harvested in multiple regions. Quality ranges, but is mostly good. Demand is fair to high. FOB prices have been climbing steadily. **Eggplant:** Eggplant supply has really picked up from Mexico. Quality is mostly good; choice grade eggplant is available. The market is weaker as supply exceeds demand. Volume deals available on 18 ct. and 24 ct. packs. No change expected, some growers talking about abandoning older lots in the field to cut costs. If this happens, supplies could be down for a week or two.

Lettuce:



Iceberg: This market is steady with most suppliers. Demand is light, overall. The weights have been very sporadic amongst the different shippers. Wrap has been averaging 33-43 pounds which is a large spread Puffiness, mechanical and ribbing have been the main complaints seen upon arrivals. Expect steady supplies for the week. Next week there is a chance of lighter supplies by the middle of the week. The desert region is where most lettuce is being harvested. There is little to nothing in Santa Maria and suppliers are sold out for the week in this region. **Leaf:** Good supplies of romaine as well as leaf items continue for the week. Overall, this market is steady. Romaine hearts have steady production as well. Overall, demand is off, and the market is competitively priced. Aside from some occasional mechanical and insect damage, reports continue to show minimum defects overall. The quality continues to be good. Expect good availability through the middle of next week in the desert. **Tender Leaf:** We have had some lettuce ice over the past few days. This will cause some issues with quality of the components of spring mix. Leaf texture and solidity will be compromised and as a result, we will see more wetness and bruising of the leaves. This will lead to some slimy decay. We have also had some inconsistent supplies of flat leaf arugula as grower's gap in acreage with customers having to switch to wild arugula. Cello spinach supplies are limited as we are experiencing a supply gap as a result to acreage being ahead of harvesting schedules from previous weather in Yuma. The markets are still steady even with these intermittent supply gaps. This scenario will continue into next week.

Onions:



Green Onions: The green onion supply situation has not changed. Because of the lack of labor from the holiday season, we are experiencing a severe shortage. The markets are extremely active with no relief for two more weeks. As it will take a few days for supplies to increase and cross the border. Although the market is active quality remains really guide with minimal yellow to brown tops. **Onions:** Idaho / Oregon, the markets are steady on all sizes and colors, but demand has been strong. Transportation remains limited and some shippers have a lot of product waiting on their floors waiting to get picked up. Yellows are peaking on jumbos and mediums while whites and reds are peaking on jumbos. The quality has been good. Washington, they are also steady on all sizes and colors. Yellows are still peaking on jumbos and mediums while the reds are peaking on jumbos. The quality has been good for both.

Squash:



Squash is still available in Nogales. Volume is down slightly out of Sinaloa, Mexico. Cooler weather and cloudy days have slowed production on all squash varieties. Demand is high. The market is very strong; prices are higher on zucchini, yellow squash, and gray squash. No changes in supply expected in the next week. Supplies will increase in early to mid-January.

Potatoes:



Potatoes: Idaho, both the Norkotah and Burbank markets are steady, but the demand has been strong. Transportation remains very short. The norks have a larger size profile while the Burbank's are more average sized. Many suppliers have switched back to Norkotahs. The short weeks and strong demand have carton availability very light. The quality remains good for both varieties Washington, Norkotah cartons are steady on all sizes and are still peaking on 80's and larger.

The quality has been good. Colorado, their market is steady on all sizes and they are heavier to 70/80/90s. The quality has been good. Wisconsin, their Norkotahs are also steady and have been peaking on smaller counts. The quality has been good. **Color Potatoes:** Western Washington, all colors are all steady with good availability. A size is the peak size for all, and the quality has been good. Eastern Washington, reds and golds are both steady, and they are also peaking on A size. The quality is good Bakersfield, California, reds, whites, and golds are all steady. The availability is good, and the tighter truck market hasn't hampered availability really. The quality is good. Idaho, red and gold potatoes are steady on all sizes. Expect heavier packing this week and improved availability as the week goes on. Both colors are peaking on A size and have had excellent quality. Wisconsin, reds, and golds are both steady and are heavy to A size. Trucks are slightly easier here than North Dakota. Some suppliers here are finished with their better-quality potatoes and will begin to source bulk from other states to repack. Quality is good. North Dakota, red and gold potatoes are steady with good availability. Transportation continues to be the hardest thing to find in North Dakota. The quality has been good.

Tomatoes:



Baja is finishing for the season while Nogales begins with vine ripe crossings helping the overall market come down. Roma tomatoes have not hit their stride crossing Nogales yet, thus declining in price at a slower rate. Cherry and grape tomatoes have not been great at the start of the winter season and adding to the perplexity of the market keep prices firm. Overall the market will continue a downward trend through January with the expectation for mid-month to bring normal markets for the season.