



WEATHER UPDATE

Salinas - Sunny for the upcoming week with highs in the low 70s and lows in the 50s. **Oxnard** - Sunny for the upcoming week with highs in the 70s and lows in the 60s and high 50s. **Mexico (Culiacan)**- Cloudy with chances of rain early next week; highs in the 90s and lows in the 70s. **Florida, Southern**– Scattered thunderstorms with highs in the 80s and lows in the 70s. **Idaho** - Sunny to partly cloudy for the upcoming week with highs in the 60s and high 50s and lows in the 30s.

TRANSPORTATION

The National Diesel Average has been recorded at \$3.394 up \$0.009 a gal from last week and up **\$0.606** gal from last year. NPC continues to monitor and track diesel fuel averages by state as well as reported truckload freight rates on a weekly basis. **Transportation continues to work through its most significant structural changes in years in regards to new laws and regulations stressing available truck volume and controlling drivers. Trucks are severely short in NC and in adequate supply nationally.**

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MARKET ALERT

Corn
Green Onions
Green Beans
Citrus
Cilantro

MARKET OUTLOOK



Apples



QUALITY  SUPPLY 

Washington is down on volumes with Reds, Golds and Fujis and considerably down on Galas (15% down) and an amazing 30% down on gr smiths. Volume will be confirmed as the State continue to harvest in the Month of October. Reds and Golds are down significant due to growers cutting their orchards down to replant Honneys, Pinks, Organics, Jazz, Lady Alice, etc. Galas and Gr Smiths - due to such a large crop last season, trees did not respond back - some will say these apples are alternate bearing. Quality of the new Crop is very good with size profile 2 to 3 sizes larger than last year. (small sizes will be limited).

Asparagus



QUALITY  SUPPLY 

Volume from Peru and Mexico is steady and we're expecting more availability on the larger sizes also. Quality and sizing are both excellent along with supply.

Avocados



QUALITY  SUPPLY 

Markets are fairly steady, with some weakness on larger sizes, but overall no big slides or excessive amounts of supply. Peru should be finished by this time and Chile should be done by the end of the month. Fruit remains very clean, with only a small percentage being graded out as #2 fruit. Supplies and markets should be good going forward, possibly until the end of the year. At the current markets demand could start to pick up as retail starts increasing their promotions.

Bananas



QUALITY  SUPPLY 

Banana volumes are expected to be sufficient with high quality fruit coming into the market. The conditions should continue to be great as no real issues with production are predicted for the remainder of the year.

Berries



QUALITY  SUPPLY 

Blueberries: Overall quality is good. Supplies are lighter due to the transitions in growing areas. Mostly Peruvian. But Uruguay and Argentina starting up soon. Mexico also expected to start up first week of November.

Blackberries: Quality being reported fair to good. Markets are extremely active. Mexico ramping up and starts back up in another week or so.

Raspberries: Quality being reported mostly good. Supplies are steady. Prices are steady to higher. Mexico ramping up, 2-3 wks.

MARKET OUTLOOK

Broccoli



Supplies are steady this week and in the upcoming weeks. The demand is good and the market is holding steady.

Brussels Sprouts



Production supplies are light to normal. Quality is still good, expect markets to maintain steady.

Cauliflower



Quality is good right now. Demand is up, supplies are down slightly, and market is active.

Cantaloupes



Harvesting continues in the Westside district of California but will begin to steadily decline over the next 7-10 days as growers finish their season. Sizing at the end will lean more towards 12/15s with some 9s being available. Anticipate fair to good quality as this deal finishes due to the rain and colder temperatures (44 this morning). Arizona, plagued by rains the past two weeks, has finally been able to get into fields to begin harvesting. Sizing in this area has been leaning mostly to larger melons (including jumbos). It is still too early to know how much effect the rains will have on quality but we anticipate fair to good quality to continue out of this area.

Carrots



Overall market is somewhat limited as California is the only growing region currently. Our yields and quality are solid and should remain that way. Colorado and Canada should be starting soon which will increase the overall supply in the market. Once they will start shipping product we will have a better idea of what their crop looks like and what overall market conditions will be.

Celery



Supplies are steady and normal this week. Markets are still fairly depressed with lack of demand, and it seems like the industry currently has plenty of supplies. Quality is good in Salinas with the Final Pack looking very good. We expect sizing to be heavier and larger sizes in Salinas all week, and there will be steady supplies for the industry on the west coast next week.

Corn



MARKET ALERT



Hurricane Michael has severely impacted the Georgia region where most corn was being harvested, our growers are still assessing the damage to the crop but it is very possible that all corn is done, if there is anything left quality will be very poor. Florida is expected to begin mid-November. Markets are currently very active and supplies are limited.

MARKET OUTLOOK



Cucumbers



Cucumber production remains light in Baja, but is expected to pick up as the last of the fields come into production this weekend. The hurricane did not affect crops in Mainland Mexico, but did keep them out of the fields for a few days. Growers are catching up on harvesting and there should be an increase in production going into the weekend. We will see light colored cukes due to the rains but condition has not been an issue. In the East, cucumber supply is limited to GA, where there are a few houses working limited volumes post storm, and Plant City, FL, where acreage is light. South Florida will start in a light way after November 1st with volumes gradually building.

Eggplant



California's Fresno area is still going with eggplant harvests and will continue for another 2 weeks, as long as the weather permits. The California Desert is in with good supplies and expects to go through November. Mainland Mexico's first eggplant harvests are on track to get started next week. In the East, eggs are mostly a GA deal, where availability is limited at this time.

Grapes



Markets and movement remain steady. Prices should hold at the current levels until November. Reds will continue at these levels but we may start to see an uptick on the green seedless as the growing season nears the end. Currently Scarlet Royals with Allisons to begin harvest in the next couple weeks for reds. Autumn King variety on greens.

MARKET ALERT



Green Beans



Mainly due to recent weather events green beans are still in a bad spot and will be until about mid-November; time will tell. Quality is still poor, prorates are to be expected, and prices will be higher. Beans are extremely tight in the East. The North Carolina shore deal is finally up and going, but volume is light from this deal. GA also has limited supply. With all the rain these areas have received, bean quality is just okay. Beans look to be extremely short until Florida comes into season in the first part of November. Limited volume continues across all districts of beans in California (Fresno, Watsonville, Stockton, Santa Maria and Fullerton areas). Supplies are anticipated to remain light over the next 1-2 weeks. The CA desert has begun in a limited way and is expecting to increase next week as other growing deals will get underway.

Herbs



Cilantro market is still slightly alerted. Quality and supply are only fair. Looking good otherwise.



Honeydews



Honeydew production is almost mirroring the cantaloupe. Mostly smaller sizing out of California and larger fruit out of Arizona. The California deal should be completed within the next ten days or so. Mexican production crossing in Nogales is also picking up momentum also with larger sizing being predominant. As mentioned in previous updates the Fall period out of Arizona is historically the most volatile time of the year with regards to supply and quality due to weather.

MARKET OUTLOOK

Iceberg



Iceberg lettuce supplies continue to be below budget. Quality is medium. There are a few issues but the crews are keeping the pack super clean.

Kale



Kale supplies remain abundant with little issues. The market is steady. Quality is good with minimal yellowing, little dehydration, and dark green color.

Leaf



ROMAINE Supplies have returned to normal. Demand is good and quality is clean with some minimal fringe burn. Crop Manager is reporting Romaine weights around 34-36 lbs. ROMAINE HEARTS Supplies have returned to normal and demand is good. Quality is good with hearts almost fully cupped. We are seeing a little more blonde as well. GREEN LEAF: Supplies are slightly below normal, and demand is good. Quality has been good with some lighter weights. RED LEAF: Supplies are normal. Demand is average, quality is good.

Tender Leaf



Arugula: Quality is fair with possible mildew due to recent rain, followed by warm days. Product is available. **Cilantro:** Supplies and quality are fair. **Kale Blends:** Quality and supplies are good on kale. **Parsley:** Parsley quality and supply are good. **Spinach:** Quality is fair with possible mildew due to recent rain, followed by warm days. Product is readily available. **Spring Mix:** Quality is fair, but supplies are good.

MARKET ALERT



Lemons & Limes



Lemons – High market remains in tact but it has eased up a bit. Prices are seemingly decreasing but not in line with a steady market just yet.

Limes– Supplies have been steady but have become slightly impacted of production difficulties, this can create a more challenging market in the upcoming weeks.



MARKET OUTLOOK



Onions



QUALITY SUPPLY

The market today is slightly softer than last week. Onion demand has been down a little bit. Super Colossal's are at \$5.00-\$6.00. Colossal and Jumbos are both ranging from \$5.00-\$5.50. Medium Yellows are going for \$5.50-\$6.00. Jumbo Reds, on the other hand, are selling for \$8.00-\$9.00, Mediums are selling for \$7.00-\$8.00. The white market has been a bit softer in the past week we see prices between \$10.00-\$12.00 on jumbos and mediums. It is a wide range. That range is due to quality; it is all over the place.

Oranges



MARKET ALERT

QUALITY SUPPLY

This market is still very active, demand exceeds supply although it is improving. Quality still remains moderate. Smaller fruit remains the tightest.

Pears



QUALITY SUPPLY

D'anjou pears are peaking on 90's and larger. Moderate supplies on 100/110's has the market steady. 120s and smaller are light with a firm market. Bosc pears have a steady market with supplies winding down for the season. Red pears are tight but should last till May. Quality is good on all pears.

Peppers, Bell



QUALITY SUPPLY

The pepper deal is very snug in the East. GA has a mixed report on the storm - mature pepper was heavily damaged but younger plants may pull through and provide some supply in a few weeks. SC growers continue to have product, but there are quality challenges due to rain that has reduced yields. There's currently a little product in Plant City, but not nearly enough to meet demand. South Florida will start in a light way in 2 weeks, which will hopefully begin to provide some relief. In the West, California's green bell production is transitioning from the Valley to the Desert. With Mainland Mexico not projected to start until mid to end November and increased demand from the East, availability will remain tight.

MARKET ALERT

QUALITY SUPPLY

Peppers, Jalapenos



Hot peppers are in the same situation as green bells. With Santa Maria slowing down along with Baja, and Mainland slowly starting, the Western chili situation is expected to be snug for the short term. There's a little volume coming out of GA, but not much product to speak of in the East this week.

Pineapples



QUALITY SUPPLY

Good volumes and HIGH quality are predicted for October as sizing has, and will continue to improve on larger counts. We do expect good volumes for the remainder of the year.

MARKET OUTLOOK



Potatoes



QUALITY  SUPPLY 

The market remains steady to slightly higher for the most part across all sizes and grades on norkotahs. Some suppliers are into burbanks which is a dollar higher or so and good news for frying potatoes. The US fall potato yield is projected at 445 cwt per acre. That is 7 cwt less than the 20-year trend yield.

Squash



QUALITY  SUPPLY 

Much of GA's squash crop was in the Lake Park area, where there was some damage but crops were not a total loss. Although there are always challenges with yellow when weather has come through, quality is surprisingly "okay" so far. Plant City is also running product and South Florida will be in business in about 2 weeks. In the West, Santa Maria is on their last hurrah as they finish up for the season. As Mainland Mexico gets past last weekend's rains and things dry out, we are expecting increases over the next couple weeks.

Strawberries



QUALITY  SUPPLY 

Supplies are quite short today. Very cool overnight temps most of the week. Warming trend coming but we are in the transition period. Northern Ca will produce less and less every week going forward and will probably be done as soon as the next rain comes. Same for Santa Maria. Start crossing straws from Central Mexico by the second week of November. Oxnard, volume is slowly ramping up, but not as fast as the volumes in the north are dropping, keeping things snug.

Tomatoes



QUALITY  SUPPLY 

Hurricane Michael came through the heart of Quincy, decimating most of the tomato acreage. There are a couple of growers that are going to salvage for a few days, but for all practical purposes there's no crop in Quincy. Georgia also received crop damages. There is a little acreage in the Moultrie area that escaped serious damage, but unfortunately, these are small deals with limited volumes. Palmetto/ Ruskin growers continue to get up and running slowly but surely. Grape tomatoes have already started and some are beginning to pick a few rounds. The first roma harvests are still about two weeks away. Although growers in the area are up and running, we don't expect substantial volumes until the 1st or 2nd week in November. Volume is beginning to slow in CA's San Joaquin Valley as growers begin to drop out. However, we do expect to have rounds and romas from the area until the end of October. Tropical storm Sergio passed through Mexico last week, dropping rain in Baja and Eastern Mexico. Initial quality of Fall crops in Baja will likely show effects of the precipitation, but should clean up as growers move further into the season. Eastern Mexico expects sporadic production for the next several weeks due to the storm. Grape tomatoes (both organic and conventional) continue to be very snug out of MX.



MARKET OUTLOOK

MARKET ALERT

Onions Green - Iced: Steady market demand exceeds supply again this week. Crossings are down over 40% of normal currently, creating an unprecedented market price. We will continue to see very limited supplies for the next 2-3 weeks, as current crop was planted in July when temps were 117 degrees with 75% humidity, consequently damaging current crop yields. **Iceless:** Like iced, there are extremely limited supplies crossing from Mexico due to weather. We will continue to see demand exceed supplies for the next 2-3 weeks. With local production, scheduled to end in the next 10 days, if supplies do not pick up over next 2-3 weeks, demand from eastern customer's, who have been on local programs all summer, will push market prices higher.

Cilantro—With the heavy rains in Baja Mexico and Hurricane Sergio affecting the Desert regions in Mexico, cilantro supplies continue to be impacted. Supplies cannot keep up with the demand. Prices will remain on the high side.

Georgia's unprecedented \$3 billion of ag losses

“Early estimates of agricultural losses caused by Hurricane Michael are starting to come in from the University of Georgia and Georgia Forestry Commission, and the numbers are staggering. "The meter started at \$1 billion and jumped quickly to nearly \$3 billion," said Georgia Agriculture Commissioner Gary W. Black. "Unfortunately, we are not quite sure where it is going to stop "Georgia has long led in the production of several renowned commodities and now we have the dubious distinction of also leading in the devastation and incredible loss of these prominent crops," Commissioner Black said. "These are generational losses that are unprecedented, and it will take unprecedented ideas and actions to help our farm families and rural communities recover.”

Georgia is home to a wide variety of produce including sweet corn, cucumbers, squash, peppers, tomatoes and peas, which suffered an estimated \$480 million loss. Growers were counting on high yields and strong prices for their fall harvest after experiencing a difficult spring harvest.”

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to dforsythe@nproduce.com and we will be happy to give you those current market conditions. Also look for our Spanish version that will be released on Monday and our Midweek Update released every Wednesday. Have a great week!
Keeping You Informed,



Your Dedicated NPC, LLC Staff