



WEATHER UPDATE

Salinas— Sunny to partly cloudy next week with highs in the 60s and lows in the 40s. **Yuma**— Sunny to partly cloudy next week with chances of rain showers mid-week. Highs in the 80s and lows in the 50s. **Oxnard**— Sunny to partly cloudy with a chance of showers next Wed. Highs in the 80s and lows in the 50s. **Mexico (Culiacan)**— Partly cloudy with chances of storms next week. Highs in the 90s and upper 80s and lows in the 60s. **Florida, Southern**— Sunny to partly cloudy next week. Highs will be in the upper 70s and lows in the 50s. **Idaho**— Sunny to partly cloudy next week. Highs in the lower 50s and lows in the upper-teens to lower 20s.

TRANSPORTATION

The National Diesel Average has been recorded at \$3.073 up \$0.011 a gal from last week and down \$0.244 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 in good supply overall nationally at this time.**

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MARKET ALERT

BLACKBERRIES
BROCCOLI & CAULIFLOWER
CELERY
GREEN BEANS
MELONS— CANTALOUPE & HONEYDEW
POTATOES
LETTUCE - ICEBERG, GREEN LEAF, ROMAINE & HEARTS
STRAWBERRIES
TOMATOES

MARKET OUTLOOK



Apples



The market is steady this week. New crop Washington MFC Gala, Red Delicious, Granny Smith, and Golden Delicious Apples are available. New crop Washington Fuji stocks are limited. Quality is excellent.

Asparagus



The asparagus market remains steady this week. Good volume coming in from Peru and Mexico. Quality is good from both regions. Expect the market to remain steady going into next week, but should inch up as we get closer to Thanksgiving.

Avocados



Markets are fairly steady, with some underlining weakness depending on size. Most promotions are slowing down and switching to more of fall centric commodities. Mexican supply continues to be good and unless something drastic happens, should stay steady for a bit. #2 fruit is starting to be a little bit more abundant and has gone from around 5% of the total pack out to around 10%.

Bananas



Plenty of supplies from now until week 49, then after that week we might be in a situation where supplies will be tougher to come by. This situation may remain until week 6-7 of 2020. Good supplies on organics, no major issues for the balance of the year. Finally, plantains still remain super tight and expected to remain tight until beginning of December.



Berries



MARKET ALERT: Blackberries -Tight supplies and quality challenges continue. Rains in South America continues to impact supplies and quality and have created a Demand Exceeds situation. Growers are not expecting recover for another 2 to 3 more weeks. Mexico supply is light but steady.

Blueberries: Prices moved up a bit this week. Product is coming out of California, Mexico, Peru and Uruguay. The tight Strawberry & Blackberry market is putting some pressure on blueberries.

Raspberries: The Raspberry market working up this week. The warm weather in California last week impacted quality and production. Production from Mexico was impacted by recent rains to.

MARKET OUTLOOK

MARKET ALERT

Broccoli



Supplies continue to be good this week. Growers are anticipating steady volume, the challenge will be the next few weeks when the Holiday pull begins. Talking with a few growers the demand will contribute to escalated prices. At this time growers are filling orders but are expecting the market to become very active the next few weeks. Transition to Yuma will begin over the next week or two.

Brussels Sprouts



Supplies are holding steady for this week. Growers are anticipating a very good Holiday pull, the market will become very active the next few weeks as we get closer to the Holiday. Talk with your growers to ensure all your orders get covered.

Cabbage



Cabbage supplies and quality have been reported as steady and fair to good on both red and green cabbage.

MARKET ALERT

Cauliflower



Supplies will be limited until we fully transition down to Yuma, AZ. Growers are seeing a slight uptick in supply moving into this week, but still in a very active market. Good quality is being reported as California winds down their season.

MARKET ALERT

Cantaloupes



EXTREME ALERT: CA production has finished with AZ falling off quickly. Colder temps (possible freeze) ten days ago had a significant impact on the late AZ deal. Production which should have continued until at least Thanksgiving may be finished as early as this weekend. Sizing is heavy on the smaller sizes. Anticipate mostly fair quality the balance of this season. Imports started in Florida with very good quality. Slightly greener shell color is offset by solid internal quality with brix levels in the 10-14% range. Sizing on the off-shore lopes is primarily in the 9/12 range with very few jumbos coming. Volume should pick up weekly.

MARKET ALERT

Celery



Salinas is finishing up and supply will begin out of Santa Maria and Oxnard, CA. Quality has been good. Holiday pulls will affect markets with an increase in demand which will lead to escalated pricing until growing transitions are complete. Mexico has started with celery production that will help relieve some increased demand.



Corn



Corn supplies are tight and winding down out of California and Arizona. Production out of Georgia is expected to be impacted from cold weather this coming week-end. Prices out of the East and West are working upward.

MARKET OUTLOOK



Cucumbers



Baja will only continue cucumber harvests for another week with very light supply as the last of the growers wrap up their season. Supply will shift to mainland harvest as Baja finishes up and expectation is high supply in the coming weeks with overall good color and quality. In the East, GA has finished due to freezing temperatures and has moved supply to South Florida. Quality to start out of Plant City was just fair due to heat, but expect overall quality and supply to improve as FL hits full stride. Expect to begin seeing imports from Honduras around December 1st.

Eggplant



GA's eggplant crops are winding down due to both cold weather and declining quality. Fresno and Coachella continue to harvest eggs, but are moving into the seasonal decline and will wrap up over the next two weeks. Nogales shipping began and expect good supply and quality to continue.

Grapes



Green Seedless market remains steady. Primarily Autumn Kings are in supply and quality has been fair. Expect domestic supply to be completely ended by December and for import Peruvian product to pick up the slack. Europe has a good market at the moment and the majority of fruit is going there right now. Red Seedless—Allison's are still being harvested along with Vintage and a few Crimsons. The Allison market is \$18-16.95 with Crimsons \$2 less. Allison's have better size than the Vintage and Crimsons. Peru will begin red seedless arrival in mid-December.

MARKET ALERT



Green Beans



Green bean prices have jumped higher as we continue to close in on the Thanksgiving holiday resulting from a short bean market in Florida due to bouts of cold weather. Some green beans are coming from Mexico as well. The increased demand along with shorter than expected supplies will keep the green bean market elevated through the end of the month. Quality is fair to good at the moment.

Herbs



Chervil & tarragon are limited this week due to quality issues. All other herbs are expected to remain steady with good quality.

Cilantro – Supply has improved and product quality is fair-good. The move south has allowed supply to meet demand and hold the market steady. Expect this to stay steady in the coming weeks.

MARKET ALERT



Honeydews



EXTREME ALERT: CA production has finished with AZ falling off quickly. Colder temperatures (possible freeze) ten days ago had a significant impact on the late Arizona deal. Production which should have continued until at least Thanksgiving may be finished as early as this weekend. Honeydews are limited across the board. Anticipate mostly fair quality the balance of this season as internal quality could be sporadic. Honeydews are expected to start in a small way the week of 11/25.

MARKET OUTLOOK

MARKET ALERT

QUALITY



SUPPLY



Iceberg



Lighter supplies on Iceberg lettuce this week. Growers are finished in Huron and have moved down to Yuma. Reporting good quality as initial shipments have begun out of AZ. Demand has been good and market will be active until all growers have fully transitioned.

QUALITY



SUPPLY



Kale



Suppliers are steady this week. Good quality reported with multiple growers. Expect market to remain steady for the next few weeks.

MARKET ALERT

QUALITY



SUPPLY



Leaf



MARKET ALERT- Romaine: Very light supplies continue on Romaine and Romaine Hearts this week. Most growers are finishing up in Salinas and moving down to Yuma AZ. The remainder Salinas crop is showing some fringe burn on the romaine, while newly harvested Yuma romaine is in good quality and catching up with demand. Expect markets to remain active this week until transition is complete. **(Alert includes romaine hearts, chopped romaine, & salad blends)**

Green Leaf/ Red Leaf/ Butter (Boston) Lettuce: Supplies are light but will be picking up this week. Most growers are finished in Salinas and moved down to Yuma AZ. Expect to see some smaller heads in the packs but overall quality is fair-good. Expect relief in the coming weeks as supply picks up.

QUALITY



SUPPLY



Tender Leaf



Supplies and quality are reported as good after the transition down to Yuma has completed. Expect steady supply and overall quality to remain solid in the coming weeks.

QUALITY



SUPPLY



Lemons & Limes



LIMES: The lime market remains pretty steady from last week. Smaller Seeing good demand. November could get interesting based on the strong pull in the last 60 days, evaluation in full effect. Quality is being reported as fair to good.

LEMONS: Lemons are steady this week. Supplies are improving out of the CA/AZ desert area and prices are coming down a bit. Smaller fruit remains with higher availability. No quality issues have been reported.

MARKET OUTLOOK



QUALITY  SUPPLY 

Onions



This market is steady from last week with FOBs still competitive around \$6-7 FBO on jbos, \$9 on supers, \$7 on reds and \$10 on whites. There have been cold temps in OR/ID affecting product outside as well as the recent freezes similar to the potato situation. Quality may be affected as well as the length of crop but that will be seen early 2020.

Onions, Green



QUALITY  SUPPLY 

Supplies are steady this week, growers are anticipating a bigger demand for Green Onions as we get closer to the Holiday. Expect the market to increase due to the higher demand.

Oranges



QUALITY  SUPPLY 

The orange market actually took an increase for the first time in a long time this week. Valencia oranges are finishing up and CA navels have started. Volumes should start to pick up going into next week. Quality is good.

Pears



QUALITY  SUPPLY 

Barts are now available with sizes peaking on 100/110/120ct. New crop Washington D'Anjou are available and quality is excellent.

Peppers, Bell



QUALITY  SUPPLY 

GA and SC still have product but are definitely on the downhill side of the season. Cold weather and quality concerns will bring these production areas to an end sooner rather than later. Florida is working pepper in both the central and southern parts of the state, where quality is stronger. In the West, Northern California and the coast are winding down, while Coachella and Nogales are ramping up. Areas that are winding down are getting hit by cold weather and are seeing more and more bruising. As for Coachella and Nogales, volume is solid and quality is good.

Peppers, Chili



QUALITY  SUPPLY 

Supplies out of the East are steady, with good quality. Supplies out of the west are a bit lighter this week due to higher demand and weather issues. Jalapenos out west have taken the largest hit by weather issues.

MARKET OUTLOOK



Pineapples



Volumes are expected to improve along with demand in order to cover our thanksgiving pull. We are expecting volumes to remain healthy until the end of the year with the fruit trending large.



Potatoes



EXTREME ALERT: Fresh potato shipments from the 2019 crop are likely to fall 11.19 million cwt short of 2018 movement. **Expected shipments would be the lowest modern history.** Russet table potato prices have exceeded year-earlier values by an average of 70.6% in past years when fresh shipments have fallen more than 5% short of year-earlier movement. An increase of that magnitude would lift Idaho's weighted average shipping point price to \$26.50 per cwt for the 2019 crop. Markets continue to rise from even last week, seeing some quality issues as they see what the frost and cold has really left them with as well. Suppliers are cutting back from 5 day packing weeks to 4, cutting shipments, etc. FOBs remain around \$20 on big spuds, \$13 on the smaller stuff and #2s ranging from \$10-16.

Squash



GA has finished up and production has moved to South Florida and will remain constant moving forward. Quality has been nice. With CA farms almost out of the picture, Mexico is the place for Western squash. Numbers were strong last week and Sinaloa area has begun to show good quality and strong numbers. Expect this to remain steady in the coming weeks with supply on the rise.

Strawberries



As you know strawberries traditionally tighten up during the winter months. The recent heat, wind and wild fires hasn't helped the supply situation in California either. To make matters worse this year, Mexico's season has been delayed due to rains last month associated with tropical storms. Most growers are requesting extra order lead times to give them some extra time to line up product. Production out of Mexico will continue to pick up each week. Volume from Mexico is needed for sure. Limited production out of FL has begun but volume won't begin until first or second week of December.



Tomatoes



Rounds - Prices are off slightly this week. Production out of Mexico continues to be on the weaker side. Supplies out of Florida has been weak but picking up daily. Production out of California is for the most part done for the season. Romas - Supplies still on the tight side right now due to lower than expected production. Product is coming out of Florida and from Mexico through Mc Allen TX. With Ruskin/Palmetto and South Florida both in production and warm weather bringing on crops, Florida's grape tomato supply is strong this week. Grape volumes are mostly steady out of Baja and Central Mexico and more growers will come online over the next few weeks.



MARKET OUTLOOK

The Packer: Goodbye, Generic UPCs, As Produce Shifts to Specific Codes



Generic U.P.C.



Brand Owner-
Specific U.P.C.

“Starting in 2020, new generic Universal Product Codes will not be issued for produce in the U.S. and Canada, with company-specific codes taking their place. The Produce Marketing Association and Canadian Produce Marketing Association announced the change Nov. 13, “at the direction and influence of the industry,” according to a news release. That includes PMA’s Produce ID Committee and the Romaine Task Force, whose recent report on an E. coli outbreak supports the elimination of the generic UPCs. The industry has been shifting away from the generic codes for numerous reasons, including better category management data, enhanced traceability and a more accurate inventory for retailers and suppliers.

Using the owner specific UPCs — or Global Trade Item Numbers (GTINs) which companies have been adopting as a UPC alternative — also enhances food safety by speeding up the recall process, according to the CPMA/PMA news release.

“There are a variety of benefits for retailers when our suppliers convert from generic UPCs to company-specific UPCs,” Harlan Ewert, produce commodity coordinator at The Kroger Co., said in the release. “Company-specific UPCs provide us with better data to make meaningful decisions in our business. For example, they enable retailers to differentiate between brands of products in the same category and determine sell-through and shrink data by brand.”

Floral products are not included in the policy change, and current generic UPCs for fresh produce will not be affected. The Produce Electronic Identification Board created the generic codes in 1990 to help capture and store data across multiple categories and companies, making checkout more accurate for retailers, Ed Treacy, PMA’s vice president of supply chain and sustainability, said in the release.

““Over time, the costs and capabilities of data tracking and storage have changed,” he said in the release. “Sunsetting the issuance of generic UPCs is one more way to empower our industry to do more with data.”

The produce associations recommend that companies consider the change when ordering packaging, and that retailers do the same when making category management decisions or ordering product. With the rise of GTINs and decreasing requests for generic UPCs, the produce associations “believe now is the appropriate time to begin the next steps in this change,” Jane Proctor, CPMA’s vice president of policy and issue management, said in the release.

“Once we no longer issue new generic UPCs, we will work at the direction of industry to develop a plan to sunset the use of the existing generic UPCs across the industry,” Proctor said in the release.

Starting in 2020, produce companies needing a brand-owner specific UPC will need to obtain a company prefix through GS1. The company also has information on obtaining GTINs.”

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