



October 13, 2023

Guatemala : Recent political unrest and protests in Guatemala are severely impacting the supply chain for products grown and distributed from that country. Civil disturbances have made many roadways impassible and blocked access to port facilities. This has created a Force Majeure event forcing trucking and sea cargo companies operating in Guatemala to temporarily cease operations until there is safe access to roads and ports. **Commodities affected including but not limited to : bananas, french beans, snow and sugar snap peas, baby rainbow carrots, baby heirloom tomatoes.** [Link to The Packer Report](#)

Bananas : The demonstrations in Guatemala continue to impact cargo movement within the country due to roadblocks – with more than 100 roadblocks throughout the county that are inhibiting transit to the ports. Because of this, the country is paralyzed with severe shortages of fuel and supplies. Banana operations are also impacted both within Guatemala as well as transport between Guatemala and other countries. The banana volume to be loaded is subject to the container transit into the port facility. We will continue to monitor and update you on the situation. We are hopeful that the supply chain can safely resume operations soon. Guatemala bananas represent about half of the supply that enters North America, followed by Ecuador, Costa Rica, Honduras and MX.

Green Beans : Escalations and prorates in effect. Supplies are limited. The market will remain elevated for the next 3-4 weeks. Beans are transitioning to Florida. Hurricanes impacted the growing regions of Georgia and Mexico, resulting in crop losses. Production and volume are expected to be limited and challenging until the end of October. Volume is expected to increase in November for the Thanksgiving holiday.

Tomatoes : Prices for Cherry and Grape Tomatoes are trending up this week. Prices for Roma's are mixed this week. Grapes and Cherries are expected to remain tight through the month of October. The weather is cooling down in the East and production is working its way South to Ruskin FL. Roma's are expected to get a bit tighter out of Mexico due to Hurricane Lidia. We 'll know more after growers assess the damage over the next few days.

Chili Peppers : Prices for Chili Peppers are trending up this week. Production is coming out of Michigan, Georgia, Santa Maria, and Mexico. Hurricane Lidia in Mexico is expected to tighten the market up a bit. Production out of the East is transitioning from the North to Georgia. Growers are expecting a volatile market for the next few weeks.

Grapes : The Red Grape market is tightening up a bit which is leading to a slight increase in pricing on reds. Due to weather events and crop loss, domestic season is expected to end earlier. November and December can be very complicated times for this category due to gaps in transition.



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Berries : Blues = Force Majeure : Prices for Blueberries are trending up this week. Peru is reporting a 50% crop loss due to El Nino. Some fruit is coming in from Chili but not enough to cover the shortfall. We can expect higher prices and order cuts through the end of the year. We suggest that clients utilize Strawberries, Blackberries and Raspberries on their menus to replace blueberries where possible. Prices for Blackberries are trending up this week. Production is coming out of Mexico. Supplies remain tight. Hurricane Lidia could put more pressure on supplies during the weeks to come. Prices for Raspberries are trending up this week. Volumes out of Watsonville California is coming down. Supplies out of Mexico remain tight. Hurricane Lidia could put more pressure on supplies during the weeks to come.

Carrots : California and other carrot regions are experiencing weather-related challenges, with jumbos and cellos in low supply. Prorates may be expected. Table carrots can be a good substitution. Imperial Valley & Riverside County, California: Tropical storm Hilary introduced unseasonal downpours in these two regions in August and September of 2023, disrupting plantings. Kern County, California: Tropical storm Hilary introduced unseasonal rainfall in August 2023. As a consequence of Hilary, planting was delayed by a week. The area was further impacted by an atypical drop in temperatures in September. This is leading to reduced yields. Georgia: The devastation from Hurricane Idalia in late August and early September has significantly affected carrot farms which will affect January volume.

Limes : Costs remain elevated, especially on large fruit. There's a significant pricing gap across the sizing spectrum. The market is expected to be relatively stable/firm over the next few weeks; demand will dictate. The new bloom has been impacted by severe weather events over the last few months; pricing & availability could represent record-breaking numbers vs. "normal" historical trends in Q4. In addition, extreme heat and humidity has impacted quality and shelf life, which is also contributing to low availability. Quality remains subpar. Peak sizing currently consists of small fruit, including 230's & 250's; large fruit is scarce. Small fruit represents approximately 70% of total harvested yields; 110's & 150's will account for roughly 5-10% of the crop potentially until Q2 2022. Consider opening your spec to complement crop trends and ensure supply.

Broccoli : Supplies are steady for this week. Demand for Broccoli continues to be strong . Supplies will be coming from Salinas Ca, and Santa Maria Ca. There are supplies available from Mexico. Growers are reporting improved yields this week. Market pricing has also improved and supplies should continue improving the next few weeks. (F.O.B pricing for this week \$21.00 - \$22.00).



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Broccolini : Supplies continue to be light this week. Demand has definitely increased. We expect for supplies to be limited for a few weeks. Growers are reporting brown bead and flowering defects in Broccolini. Market pricing is higher. (F.O.B pricing for this week \$30.75 - \$34.55).

Cauliflower : Supplies are very limited this week. Demand for cauliflower has increased. Supplies will be coming from Salinas Ca, and Santa Maria Ca. There is product available from Mexico as well. We are expecting for supplies to be light the next few weeks. Summer defects and weather causing delays for product to mature are causing lower yields this week. Quality will be only reported as fair. (F.O.B pricing for this week \$34.00 - \$36.00).

Brussels : Supplies continue to be light this week. Quality is reported as only fair. Demand for Brussel Sprouts is strong. Market pricing and contracts pricing is expected to remain escalated. Supplies will remain light causing markets to remain high and prices will continue to remain escalated. (F.O.B pricing for this week \$48.00 - \$50.00)

Green Onions : Supplies will be light next week. Previous Hurricane caused some crop damage, previous weeks the growing area suffered an extreme Heat Wave. Current supplies are coming from Mexico. Escalated markets are starting to improve. Expect fair quality only on the green onions for the next few weeks. (F.O.B pricing for this week \$20.00 - \$22.00)

Cilantro : Supplies are limited this week. Quality is reported as only fair. Market pricing has escalated. Supplies are now shipping out of Salinas Ca. and Santa Maria. Growers are reporting lower yields and fair quality. Growers are reporting market conditions to continue for a few weeks. (\$21.00 - \$22.00)



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Annual Transition : Attached are the tentative grower transition dates for Yuma, AZ. We do expect to have a smoother transition compared to last year. With any transition we always expect delays for harvest, extended loading delays, and fair to poor quality on some commodities due to weather conditions. Once we start to transition expect to see several challenges for the month of November. Growers will normally have things dialed in. By the first week of December. Below are some key points to consider during transition:

- Harvest delays. Shorter days and colder nights, plants delay to mature in time for harvest.
 - Coolers and Loading appointments. First few weeks in Yuma can be overwhelming as all distributors looking to load on the same days. Warehouse crews need to adjust to different facilities and sometimes new work crews.
 - New Harvest crews. Adjustment period for new harvest crews, meeting the specific specs for commodity packs.
 - Quality Concerns. Transition from crops ending in one region and starting in another. Some ending crops will not look as fresh and crisp as new crop. Also new crop, some growers will harvest prematurely to ensure no disruption with supplies, also affecting quality.