



## WEATHER UPDATE

**Salinas**— Sunny to partly cloudy next week with highs in the 70s and lows in the 40s. **Oxnard**— Sunny to partly cloudy next week with highs in the 70s and lows in the 50s. **Mexico (Culiacan)**— Sunny to partly cloudy next week. Highs in the upper 90s and lows in the 60s. **Florida, Southern**— Cloudy next week with chances of isolated thunderstorms next Friday & into next weekend. Highs will be in the upper 80s and lows in the 70s. **Idaho**— Sunny to partly cloudy next week. Highs in the mid-40s and lows in the teens.

## TRANSPORTATION

The National Diesel Average has been recorded at \$3.064 up \$0.014 a gal from last week and down \$0.253 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 in most of the country, however there is slight shortages in Eastern North Carolina.**

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### MARKET ALERT

- BLACKBERRIES
- BROCCOLI
- CILANTRO
- CAULIFLOWER
- ICEBERG LETTUCE
- MELONS— CANTALOUPE  
& HONEYDEW
- POTATOES
- ROMAINE / HEARTS
- SNAP & SNOW PEAS
- STRAWBERRIES
- TOMATOES

# MARKET OUTLOOK



## Apples



The market is steady this week. New crop Washington MFC Gala, Golden 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. Volumes are steadily increase. Seeing good demand and good quality. Expect the market to increase based on quality and availability.

## Avocados



Avocado markets are fairly steady. Supply is good and still trending towards smaller fruit, but as more users move down to smaller sizes, the demand is getting better for them. The rains over the last week, only helped to clean up the market and also left fruit on the tree's a little longer, which could help with the sizing. The percentage of #2 fruit is increasing and there should be more available going forward.

## Bananas



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

**MARKET ALERT**



## Berries



**MARKET ALERT: Blackberries** -The extremely tight supplies & quality challenges continue. Rains in South America impacted supplies and quality. Production out of CA is winding down & limited. Growers are not expecting to recover for the next 2 / 4 weeks.

**Blueberries:** Market pricing is trending down a bit this week. Supplies and quality are good at this time. Product is coming out of Mexico, Peru and Argentina.

**Raspberries:** The raspberry market is steady this week. Product out of Mexico is increasing and quality is improving.

# MARKET OUTLOOK

**MARKET ALERT**

## Broccoli



QUALITY



SUPPLY



Supplies have improved this week. Good to fair quality is being reported at this time. Growers are starting to see better quality at the time of harvest. Contract pricing is back to normal. Whole case commodity orders from distributors are expected to be filled 100% by growers. Processors are **prorating orders for Broccoli Florets at this time.**

## Brussels Sprouts



QUALITY



SUPPLY



The sprout market remains steady this week. Good supplies and fair quality are being reported. The market is expected to remain steady going into next week.

**MARKET ALERT**

## Cauliflower



QUALITY



SUPPLY



Supplies have improved this week. Good to fair quality is being reported at this time. Growers are getting better quality and better yields at the time of harvest. Contract pricing is back to normal. Whole case commodity orders from distributors are expected to be filled 100% by growers. Processors are **prorating orders for cauliflower florets at this time.**

**MARKET ALERT**

## Cantaloupes



QUALITY



SUPPLY



**EXTREME ALERT:** Production in CA has basically concluded for the season & growers have already started transitioning to AZ. This region has been battling rain, hail, field disease, etc. and are experiencing horrible yields so far on both cantaloupe & honeydew. Larger fruit is fetching a premium currently as weaker fields are producing smaller fruit (15ct lopes and 8ct dews). We will work with everyone to formulate a game plan to get us through this period. As usual during times like these, flexibility of sizing will be necessary.

## Carrots



QUALITY



SUPPLY



With cooler temperatures Bakersfield carrots are improving quality. Supply is steady.

QUALITY



SUPPLY



## Celery



Celery supplies are slightly lighter this week out of Salinas. Quality is being reported as fair to good. Mexico is just getting started. Expect market to be steady going into next week.

QUALITY



SUPPLY



## Corn



Corn is steady this week with good production out of the East and West. California has plenty of White Corn while Georgia has good numbers on yellow.

# MARKET OUTLOOK



## Cucumbers



Cucumbers are feeling a bit of upward pricing pressure due to lower production. Supplies out of Georgia are tighter as a result of the recent heat. Production out of Florida is slowly starting.

## Eggplant



Supplies on eggplant is steady out of the East and West. Production is coming out of Georgia, California, and Mexico. No quality issues have been reported.

## Grapes



Overall market is steady with a few bad arrivals starting to pop up on weaker fruit. Red Seedless, Scarlet Royal and Allison's are plentiful. Green Seedless, Autumn King still getting harvested with most growers ending harvest the first two weeks of November, market will continue to rise into November. Black Seedless, Autumn Royal, are getting harvested and the market remains steady.

## Green Beans



GA farms continue to harvest beans, but several are in skips due to heat during the growing cycle. Recent rains have also kept them out of the fields, so volume is light this week. This should improve next week, but there are few quality concerns as they near the end of the season. A few FL farms have started up with more to come. Baja is on the increase & should remain into good numbers for the next few weeks. CA desert is up & running in a limited way and should see steady supplies for the next few weeks. Mexico has gotten started with northern crops which could go for about 3 weeks.

**MARKET ALERT**



## Herbs



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

**MARKET ALERT: Cilantro** – Supplies continue to be limited this week; markets continue to be escalated. The Salinas season is coming to an end our next region will be Oxnard and down to Yuma AZ in a few weeks. Expect markets to be limited for the next few weeks. Growers are not reporting any shorts or prorate currently.

**MARKET ALERT**



## Honeydews



**EXTREME ALERT:** Production in CA has basically concluded for the season & growers have already started transitioning to AZ. This region has been battling rain, hail, field disease, etc. and are experiencing horrible yields. The biggest concern for us over the next 2-3 weeks are the honeydews as Mexican production has been battling issues of their own and their yields are extremely low. This could be setting itself up to be an Act of God situation if newer fields do not begin producing.

# MARKET OUTLOOK

**MARKET ALERT**

QUALITY



SUPPLY



## Iceberg



Supplies are better this week. With the new region starting up in Huron CA. This has improved supplies & created a more stable market. Whole case commodity orders will be filled at 100%. Processors are also filling orders 100% currently. No prorates to report from any grower or processor.

QUALITY



SUPPLY



## Kale



The kale market remains steady. Volumes are slightly lower this week. Good quality has been reported by multiple growers. Expect the market to remain steady going into next week.

**MARKET ALERT**

QUALITY



SUPPLY



## Leaf



**MARKET ALERT- Romaine:** Supplies have improved slightly this week, but prices remain escalated in this market. Whole case commodity orders from distributors are expected to be filled 100% by growers. Processors are also filling orders 100% currently. No prorates to report from any grower or processor. **(Alert includes romaine hearts, chopped romaine, & salad blends)**

**Green Leaf/ Red Leaf/ Butter (Boston) Lettuce:** Supplies remain light on leaf lettuce this week. Red leaf is better this week & market remains steady. Quality is being reported as fair. Still reports of some fringe/ wind burn on the outer leaves. The markets are expected to be steady to higher going into next week.

QUALITY



SUPPLY



## Tender Leaf



Good supplies on tender leaf at this time. Production has normalized as the weather has improved. Production will start transiting to the Yuma areas around the middle to late part of November. As you know there's always some interruptions in production during transitions as growers move production equipment to the new production areas. Giving your growers a little extra order lead time for additional planning will help with order fill rates.

QUALITY



SUPPLY



## Lemons & Limes



**LIMES:** The lime market remains pretty steady from last week. Smaller fruit is back up a buck or two, everything hovering. 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



Good supplies, along with good demand. There is some concern similar to potatoes here in regard to the recent weather events. They did have to stop harvest since the onions sit on top of the ground and can't be harvested or stored in damp / rainy conditions. It has also been very cold so what was harvested has also had to deal with rough conditions. Currently markets remain stable and competitive, super colossals are at \$8. Colossals are \$7. Jumbos are \$6 to \$6.50. Mediums are sitting at \$5 to \$5.50. Reds are between \$6 and \$7 on Jumbo and \$5 to \$6 on mediums. Whites are \$11 and \$10.

QUALITY



SUPPLY



## Onions, Green



The green onion market remains steady this week. Eastern production is slowing down. Supplies out of Mexico remain light. Quality is good. Expect the markets to remain steady, until the eastern growing areas get their first freeze.

QUALITY



SUPPLY



## Oranges



The orange market remains steady 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.

QUALITY



SUPPLY



## Pears



Barts are now available with sizes peaking on 100/110/120ct. California Anjou's are still available - there will be no gap between CA and New Crop. New crop Washington D'Anjou harvesting will begin in September. Quality is excellent.

QUALITY



SUPPLY



## Peppers, Bell



Green pepper pricing is still elevated in the West while peppers out of the East is more reasonable in regard to quality and pricing. Red pepper pricing is still elevated at this time too. Production has failed to pick up to date. Yellow Peppers are steady.

QUALITY



SUPPLY



## Peppers, Chili



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. Expect the market to go up a bit going into next week due to lighter supplies out West.

# 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:** The market continues to rise. Most of you are aware that Idaho experienced an extended stretch of freezing temps that had a significant impact on the crop. Production is being cut across the board as estimates coming in are about a 20% crop loss, on a crop already with low yields and minimal size. Markets are hitting \$20 fob, grower shippers are reviewing programs, and it's going to take everyone working together to get through this. Most important task at hand is ensuring supply through next August. If they keep shipping at current rate there is no way, we'd make it into summer. By reducing production now, they will be trying to stretch what they have. There will be more to come on this in the coming days & weeks. This bad of a situation hasn't occurred since 1985. Flexibility on sizing & regionality may come into play to ensure potatoes stay on the table year round.

## Squash



Good production out of the East and West on both yellow and green squash. Supplies are coming out of Baja, Mexico and Georgia. Harvesting out of Florida is just around the corner.

## Strawberries



Strawberry supplies will remain tighter than usual this week due to high winds and fires throughout California. Growers are still challenged with quality and smaller than usual size fruit from the excess heat last week. Mexico is crossing fruit, but supplies has been hampered by all the rain that they've experienced over the month.



## Tomatoes



Round and Roma tomato cost continue to be elevated this week due to tight supplies. Product is tight out of the West. Production in the East is moving to Florida. Bad weather from about 4 weeks ago slowed down production in South Florida a bit. Grape volumes have picked up in FL this week as several growers experienced a mini flush due to heat bringing the fruit on sooner than planned. Quality has been very nice. Mexico also has good-quality product available from Baja and Central Mexico with more to come as additional growers get started in the next few weeks.



# MARKET OUTLOOK

**MARKET ALERT**

**MARKET ALERT: SNOW & SUGAR SNAP PEAS** - Volumes remain limited due to the consistent battle with rain in the growing regions. **Expect 15% pro-rates.** Market are steadily rising. Expect escalated pricing.

## Tomato leaders spar before the International Trade Commission

Mexico and U.S. tomato leaders sparred Oct. 25 in testimony before the International Trade Commission that is likely to determine the fate of the new tomato suspension agreement. Within 45 days, the ITC will determine if Mexican dumping of tomatoes has caused injury to U.S. growers. In testimony before the International Trade Commission, tomato industry leaders from Mexico and the U.S. gave widely differing views on what has been driving demand for Mexican tomatoes. Michael Sullivan, CEO and president of Gargiulo, Inc., was among those speaking in support of the antidumping duty on Mexican tomatoes.

One excerpt from Sullivan's testimony: *"In 2019, we decided that we had to plant fewer acres, and our packing houses are only operating at about 80 percent of our capacity. When the suspension agreement terminated, the prices initially increased, but then returned to the normal - low - level as imports from Mexico continued. Depressed sales values and low operating profits are not sustainable. If we do not get relief, real relief, from the dumped tomatoes imported from Mexico, we will continue to reduce acreage and eventually we will close our farms. By way of illustration, in 2005, we farmed 8,363 acres, with an average employee count of 2,400. In 2019, we are farming 6,500 acres, with an average head count of 1,600."* Sullivan continued: *"We hope the new Suspension Agreement will work. However, given the history of all of the past Suspension Agreements, it is an open question whether it will work. We need antidumping duties to ensure a level playing field in case the Suspension Agreement fails. Otherwise, there is nothing to stop the dumped Mexican tomatoes from putting American farms out of business. Without this relief, we will not survive."*

Those opposed: Among those speaking opposition of the antidumping order, Lance Jungmeyer, president of the Fresh Produce Association of the Americas. Jungmeyer said that Mexican tomatoes have helped advance the entire industry, including Florida growers. From his written testimony to the ITC: *"You are here today to decide whether imports of fresh tomatoes from Mexico injure or threaten to injure the petitioning US industry. The following facts demonstrated that the answer to that question should be a resounding "NO".*

*The data show that, since this saga began in 1996, the petitioners have done little to innovate or move their horticultural interests forward. With the continued market share decline of their primarily field-grown gassed green tomato product, the (Florida Tomato Exchange) companies have largely hitched their wagons to their competitors in Mexico, investing in fields, packinghouses and strategic partnerships there in order to remain relevant in the marketplace. Indeed, far from causing injury, the importation and distribution of Mexican tomatoes is one of the only things keeping FTE marketing companies in the game.*

*While FTE would also have you believe it has lost market-share in the United States, this is actually not the case. The companies that represent the largest volume of US production, some of which testified here this morning - Lipman Family Farms, Pacific Tomato Growers, Proccacci Brothers and DiMare Fresh - have all started growing in Mexico or purchasing Mexican tomatoes that they then distribute in the United States. Instead of investing in protected agriculture technology in the United States, they have made the business decision to grow, import and distribute Mexican tomatoes. Over the last few years, they have systematically bought up distribution operations all across the United States and transitioned from tomato farming to tomato marketing."*

SOURCE: <https://www.thepacker.com/article/tomato-leaders-spar-international-trade-commission>

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](mailto: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. Have a great week!