



WEATHER UPDATE

Salinas - Sunny for the upcoming week with highs in the low 70s and lows in the 40s. **Yuma** - Sunny with highs in the 70s and lows in the 50s for the upcoming week. **Oxnard** - Sunny to partly cloudy for the upcoming week with highs in the 70s and lows in the 50s. **Mexico (Culiacan)**- Sunny to partly cloudy; highs in the 90s and lows in the 60s. **Florida, Southern**– Thunderstorms and partly cloudy with highs in the 80s and lows in the 60s. **Idaho** - Mostly sunny skies next week with highs in the low 40s and lows in the teens; Winter is coming!

TRANSPORTATION

The National Diesel Average has been recorded at \$3.338 up \$0.017 a gal from last week and up **\$0.541** 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 short in ID, OR, NE, CO & WA and in adequate supply otherwise.**

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MARKET ALERT

Corn	Cauliflower
Avocados (EXTREME)	Iceberg
Green Beans	Romaine
Tomatoes	Green Onions
Peppers	Cilantro
Sugar Snap Peas	Broccoli

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 

Market unchanged really from last week. Prices steady, but should increase after next week in preparation for Thanksgiving. Mexico, good volume, and Quality.

MARKET ALERT

QUALITY  SUPPLY 

Avocados



EXTREME : The entire industry is currently at the mercy of The Avocado Council in Mexico, whom remain on strike today refusing to harvest fruit. We are watching the situation closely and will continue to keep you updated as things change / hopefully improve. At this point there is no resolve to the avocado grower strike and we do not have a date when harvesting will resume. Harvest has not taken place for 12 days now. Our recommendation is to open up spec for all available sizes and grades. Once harvest resumes it will take additional time from days to weeks to refill the pipeline, ripen, etc. To put this into perspective, Mexico supplies roughly 95% of the US market Avocado demands this time of the year. Prices are WAY up, and supply is getting non existent.

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.

QUALITY  SUPPLY 

Berries



Blueberries: Markets are extremely active with multiple growing areas in play. Pricing is continuing to drop as heavy volumes pour in from Peru. Overall quality is good to very good. Quality being reported good out of Chile. Shipments mostly coming out of the North where temps are more favorable. Mexico blues, quality good and quality is firm. Mexico and Argentina are pushing to compete in the market but freight is still a challenge. **Blackberries:** Mexico quality reporting fair to good, picking up week by week. **Raspberries:** Quality being reported fair to good. Supplies are peaking out of Central MX and California next week. Prices are steady.

MARKET OUTLOOK



Broccoli



MARKET ALERT

QUALITY



SUPPLY



Broccoli production is still lower than expected. Good quality is been packed, market and supplies will remain steady until everyone finishes the transition to Yuma.

Brussels Sprouts



QUALITY



SUPPLY



Brussel Sprout production is steady. Demand is higher this week with the Holiday around the corner. Excellent quality is been reported at multiple growers. Market to remain steady.

MARKET ALERT

Cauliflower



QUALITY



SUPPLY



Cauliflower production is lower than previous weeks. The demand for Cauliflower is higher this week. Good quality is been reported, some growers are reporting to be sold out on supplies. Expect Cauliflower markets to stay high for next week.

QUALITY



SUPPLY



The cantaloupe situation remains very challenging on the supply and quality side. The rejection rate on desert melons has been very high so growers are now limiting their daily pack which has significantly decreased the overall volume putting the cantaloupe market in a very short position. Guatemala will start harvesting melons within the next few days with momentum in 10 days and west coast in 20.

Cantaloupes



QUALITY



SUPPLY



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.

QUALITY



SUPPLY



Celery



Celery productions is about normal. Demand for Celery is a lot higher this week. Good quality is been reported from Salinas and Oxnard growing regions. With the Holidays approaching expect the Celery market to maintain high for next week.

MARKET ALERT

QUALITY



SUPPLY



Corn



Corn has improved but only slightly. Florida has started picking in a lighter way and they have fancy corn available. The market is still on the higher side. Available out of CA as well but again, prices remain up. Texas has rain damage and supplies almost non-existent. When FL picks up next week things should improve.

MARKET OUTLOOK



Cucumbers



Baja's cuke production is on the downhill slide and will go another 2-3 weeks. However, Sonora and Sinaloa farms are bringing strong volumes into Nogales. Quality and condition are good from each of the growing regions as long as product is fresh. In the East, GA farms continue to work fruit from new fields but are definitely winding down. Central FL has limited acreage with light volumes. Fortunately, South FL is up and running and will see volume increase over the next few weeks as more growers come online and farms get deeper into harvests. Also, look for Honduran imports to start showing up around December 1st. In general, quality is nice from

Eggplant



Although production is light in the East, GA's end-of-crop fruit and FL's new fields are providing enough product to meet market demand. FL's quality has been especially nice so far. The West has good supply available from the CA desert for a few more weeks which will be helpful as we wait for Mainland Mexico's supply to become more consistent.

Grapes



Mostly Scarlet Royal and Allison for red grapes right now. Vintage red are just beginning to harvest. Growers trying to get the bottom end up on pricing. Movement is steady. Autumn Kings are the bulk of the green seedless left to go. Overall, most growers will be finished harvesting in about 10 days, with some already finished. Some red varieties will be the last to be picked. There are a lot of grapes in the cold storages as this is one of the largest grape crops on record. Supplies will last into the new year but condition will be the defining factor as imports from Peru will begin to arrive in late Nov and Dec.

MARKET ALERT

Green Beans



Slow progress, but progress! Eastern supply has improved ever-so-slightly from last week, but beans continue to be extremely short as we near the holiday. There's now a little product coming from South GA, north FL, and the Lake area. Low yields are keeping harvest numbers down but we expect to see gradual improvements over the next few weeks. South FL will start picking next week in a small way but won't see "normal" volumes until after Thanksgiving. On a positive note, quality has improved from previous weeks. The West has limited supply from CA growing districts and is anxiously awaiting Mexico's light start, possibly next week.

Herbs



Quality and supply is looking good across the board



Honeydews



Domestic honeydews have mostly finished already after being seriously affected by the weather over the past month. Mexican production remains strong with mostly 5/6s. Honeydews will be available in Florida by the end of next week to go with the cantaloupe.

MARKET OUTLOOK

Iceberg



MARKET ALERT

QUALITY



SUPPLY



Iceberg production is a lot lower than expected. Salinas has ended with production with only Huron left with supplies the market is higher. We are expected to be harvesting lettuce from Yuma next week.

Kale



QUALITY



SUPPLY



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

Leaf



MARKET ALERT

QUALITY



SUPPLY



Romaine - Romaine lettuce production is very very low at the moment. With the Salinas Valley finishing up and Yuma starting a little late, we have created a gap in supplies. Demand is also extremely high at the moment. Quality is fair at best, we are anticipating some better supplies next week. Expect markets to remain strong for next week. Green Leaf/Red Leaf - With Salinas Valley finishing up and in the middle of the transition to Yuma. Supplies are limited until the productions moves to Yuma next week. Expect firm markets for next week with higher demand for Green Leaf and Red Leaf Lettuce.

Tender Leaf



QUALITY



SUPPLY



Arugula: Quality is fair, with possible mildew due to recent rain, followed by warm days. Product is available. **Cilantro:** Supplies are good and quality is fair. **Kale Blends:** Quality and supplies are fair for kale. **Parsley:** Parsley quality and supplies are good. **Spinach:** Quality is fair, with possible mildew and over-sizing. Product is available. **Spring Mix:** Quality is fair, with possible mildew. However, supplies are good.

QUALITY



SUPPLY



Lemons & Limes



Lemons are taking some time to color up this season in D1 (Central Valley). Mostly picking 140's and larger for retail and allowing some of the smaller sized fruit to grow. Fruit that is picked right now is requiring gas to color up but they are coloring up nicely. **Limes**—Limes are in good supply with a steady market.



MARKET OUTLOOK



Onions



QUALITY SUPPLY

Nothing has changed here! The market has been pretty stable over the last week. It is equally as cheap as the previous two weeks. The only thing that's changing is the shift as the retailer's demand comes in for the holidays. Seeing good quality and supply across the board. Trucks are tight!

Oranges



QUALITY SUPPLY

California Citrus still finishing up the last of Valencia oranges and have availability thru the end of the month. Navel Oranges started shipping last week. The color and Brix is starting to improve each day with the cooler temps we are starting to get at night. We will have good volumes on 88's and smaller through the end of the year. On Florida Juice Oranges, running hamlins now. Hamlins are considered the quintessential fall juice orange! Florida Navels started late last week will have bags and bulk available.

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.

MARKET ALERT

Peppers, Bell



QUALITY SUPPLY

Bell peppers continue to be tight this week. GA is winding down, Plant City has limited acreage, and South FL isn't due to come online for a couple of weeks. Supply will be short in the East until South FL gets into volume in December. In the West, CA Valley green bells are winding down with only the Oxnard area remaining in the mix. The desert is producing light volumes but bigger fruit is snug. Desert quality has been good, with some shape concerns but strong walls. Mexico has started in a small way and should begin to cross more substantial volumes in 10-14 days.

MARKET ALERT

Peppers, Jalapenos



QUALITY SUPPLY

There's not a whole lot of chili peppers in the East. Georgia is hit and miss on availability and shippers may not have the full line available. Plant City has just gotten started in a light way with mostly jalapenos. They should begin to see more varieties and better volumes next week. South Florida also expects to begin seeing a few chilies next week as well. The Western chili pepper market continue to be hot! Quality out of Mexico has been hit and miss due to prior rain activity. Baja is making its last run for November and will bow out right around the first or second week of December. Mainland Mexico is also going, primarily out of Sonora. With Esquinapa getting wiped out, the hot pepper market should stay strong through the rest of the month.

Pineapples



QUALITY SUPPLY

Good volumes are predicted for November 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



The market remains steady for the most part across all sizes and grades on norkotahs with burbanks about a buck up. Packers shipped 133,000 cwt more fresh potatoes during October than they did a year earlier. However, the increase was due to an extra business day in October this year. The daily shipping pace fell 4.2% short of 2017 movement. Trucks are tight!

Squash



With multiple areas in FL and GA still in production, there is no shortage of nice-quality squash in the East. Look for mostly steady production and availability for the next few weeks. Although Baja's numbers are limited, Western supply is also strong due to volume increases out of Mainland Mexico. Quality has been nice from all areas.

Strawberries



Market remains steady. Quality is based on loading areas. Oxnard reporting some soft shoulders and occasional bruising average counts of 22-24. Santa Maria growers reporting smaller fruit as well, 24-26ct. seeing some misshapen fruit, and windburn. More volume coming over each week from Mexico easing supplies. Mexico looking good, smaller sizing though 24-26ct. Florida starting up late November- first week of December depending on grower.

MARKET ALERT

Tomatoes



Production continues in the Palmetto/Ruskin area with nice quality and average yields for this time of year. The primary concern this week is size. Growers are reporting the % of 5x6 or larger fruit is down significantly from normal levels due to abnormally warm temperatures during the fruit set period. Although some cooler weather is moving through later this week, sizing may continue to be a challenge for a few more weeks. South Florida farms will begin to harvest after Thanksgiving. As for romas, there's not a lot of product in Florida yet, as only a few growers have shipped pallet type volumes so far. Overall plantings are much lighter than rounds as Florida cedes to Mexico's production for the Winter months. With the holiday approaching and Mexico's quality somewhat questionable, demand is very high for the lighter than normal volumes of grape tomatoes available in Florida. Farms anticipate an uptick in volume over the next 7-10 days. CA's San Joaquin valley growers will wrap up the season this weekend, leaving tomato supply to Mexico for the Winter months. Baja has begun Fall crops and will see round and roma volumes increase as we move further into November. Eastern Mexico will work existing acreage through the rest of the month and Mainland growers are due to start in early December. Grape tomato volumes out of Mexico continue to be on the light side and recent quality has been questionable.



MARKET OUTLOOK

MARKET ALERT

Onions Green - Green Onion production is still lower than expected. We have been trying to recuperate from the Hurricanes that passed over Mexico that brought excess rains. Supplies are slowly improving, growers are starting to fill orders with prices still been escalated. Quality is also improving.

Sugar Snap Peas—Supply is almost non-existent, Market prices are strong. Look to remain tight for a couple of weeks affecting thanksgiving. Possible pro rates.

Cilantro - Cilantro Supplies are lower this week than expected. There is a high demand for Cilantro, good quality is been reported. Expect markets to remain steady until next week.

Mexican avocados vanishing in the U.S.

“If a grower’s strike in the Mexican state of Michoacan doesn’t end soon, Mexican avocados will all but disappear from store shelves and menus by Thanksgiving, according to importers.

Since Oct. 29, packinghouses have been shut down in Michoacan, including the two Mission Produce facilities and a Calavo Growers plant.

When harvesters will be allowed to return to the groves —a group of growers demanding higher prices from packers have blocked roads accessing those ranches — is unknown, importers say. But if the situation continues much longer, the industry won’t be able to shield their customers, and eventually consumers, from the aftermath.

“I would say it’s fairly easy math as the system runs out of fruit,” Jim Donovan, senior vice president of global sourcing for Mission Produce, Oxnard, Calif., said on Nov. 8.

“We are definitely running out of inventory,” Rob Wedin, vice president of sales and marketing for Calavo Growers Inc., Santa Paula, Calif., said Nov. 8, estimating that by Nov. 13 will have shipped all of its stockpile of Mexican avocados.”

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