



## WEATHER UPDATE

**Salinas**— Sunny next week with highs in the mid-80s and lows in the lower 50s. **Oxnard**— Sunny to partly cloudy next week with highs in the upper 70s and lows in the upper 50s. **Mexico (Culiacan)**— Cloudy next week with chances of thunderstorms throughout the week. Highs in the mid-90s and lows in the mid-70s. **Florida, Southern**— Cloudy next week with chances of thunderstorms throughout the week. Highs in the upper 80s and lows in the 70s. **Idaho**— Sunny to partly cloudy next week with chances of showers next weekend. Highs in the upper 60s and lows in the 30s.

## TRANSPORTATION

The National Diesel Average has been recorded at \$2.987 up \$0.016 a gal from last week and down \$0.326 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 are slight shortages in Idaho (Upper Valley, Twin Falls– Burley District)**

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**MARKET ALERT**

**BROCCOLI CROWNS &  
BROCCOLI FLORETS**

**ENGLISH CUCUMBERS**

**LIMES**

**POTATOES**

**STRAWBERRIES**

**SWEET POTATOES**

# 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 market has settled down as volume is increasing but does remain slightly limited in volume. All sizes from STD-JBO are back in the \$20 range FOB while smalls are CHEAP, around \$11 FOB. Expect supplies to continue to improve. Quality is fair to good.

## Avocados



Mexican markets are currently inverted, with 40's and 48's being the weakest sizes. 60's and smaller are steady with good demand. The size curve initially is expected to stay inverted, but some reports are starting to come out that it will revert back to a normal size curve. The new crop is starting this week, and supplies are expected to be good over the next few weeks. #2 fruit will continue to be tight, as it is still around 5% of the total pack out.

## Bananas



Bananas are in a good supply as we are 100% back to school. Quality is good with no issues to be expected in the near future. Plantains remain tight.

## Berries



**Blackberries** are the only berry that wasn't impacted in this recent heatwave last week. Blacks are coming off in increasingly good numbers out of the Central Coast. Mexico continues with increasing numbers. Expect the market to slightly decrease as volume increases. **Blueberries** out of the Pacific NW is finishing up, while Michigan will run through mid-October. Once MI is done, all the fruit will be imports from Mexico, Argentina, Uruguay, & Peru. The Mexican fruit is coming up through McAllen, Texas & Baja California. Expect the markets to remain steady this week. **Raspberries** continue to be exceedingly tight especially as we move into the weekend. Mexico is not producing significant numbers and the west coast has been stunted by the extreme heat this past weekend. The heat not only affected the plants, but it also affected harvesting crew schedules. Expect light supplies to continue into next week with the possibility of higher pricing towards the end of this week.

# MARKET OUTLOOK

**MARKET ALERT**

## Broccoli



QUALITY



SUPPLY



Supplies remain **extremely limited** this week. Salinas Valley growers are having to deal with Pin Rot (Fungus) on the crowns. Yields and weights will be down. Quality is been reported as fair to poor. Market is expected to be higher with escalated pricing for the next 2-3weeks. **Alert included crowns & florets.**

## Brussels Sprouts



QUALITY



SUPPLY



Brussel Sprout supplies are back to normal this week. The market will be steady; growers are reporting good quality.

## Cauliflower



QUALITY



SUPPLY



Good supplies on cauliflower this week. Markets should be steady going into next week. Growers are reporting fair to good quality at this time.

## Cantaloupes



QUALITY



SUPPLY



Production remains very limited overall. As we move into the Fall season less acreage has been planted as some CA growers will be concluding their seasons over the next 10-14 days. Much cooler weather (highs in the upper 70s), & even some rain yesterday, curtailed harvests leaving availability short since late last week. Sizing had been mostly larger fruit but with the cooler weather we anticipate a slight slow-down which should spread out the sizing availability to include 12s & even a few 15s. Arizona production will start in a small way the first week of October.

## Carrots



QUALITY



SUPPLY



The western market is steady this week. Jumbos remain a bit tight with a few shippers reporting light volumes. Out to the East, supplies are good with good quality.

## Celery



QUALITY



SUPPLY



Very good supplies on celery for this week. Markets are also expected to be steady going into next week. Good quality has been reported by multiple growers.

## Corn



QUALITY



SUPPLY



Corn prices out of California are up again this week. For the most part, only white corn is available. Bi-Color is in good supply out of Michigan. White and yellow are available but more challenging due to product only coming out of Delaware. Bi Color corn out of the East is the best value at this time.

# MARKET OUTLOOK



## Cucumbers



Eastern markets have plenty of product available with the strongest volumes coming from MI & NC. Georgia is just getting started with Fall crops & volume should pick up over the next week or so. Although there have been a few spotty concerns with shrivel & sunken areas, quality has been good in all Eastern areas. Western markets are steady this week with better supplies crossing from Mexico. Some Baja growers should wrap up over the next 3-4 weeks, but the rest will go through December. Good quality on the Mexican product.

**ALERT: English cucumber** markets continue to be strong. Expect supplies to remain tight through late October as production GAPS are expected in Canada, as they are beginning to wind down for the season. Mexico should start light production in late October. Expect higher pricing the rest of the month.

## Eggplant



Good supplies on eggplant this week. CA continues with good volume as weather cools down a bit. Mexican product is coming in Nogales, so the fall transition looks to be smooth out West. Out to the East, plenty of farms have more than enough product to meet demand. Quality is good from most areas.

## Grapes



Red Seedless market remains steady with Scarlet Royal as the main variety. Green Seedless market is beginning to firm up on prices and other varieties finish and Autumn Kings begin to carry the load. Expect the market to continue to rise in October.

## Green Beans



The market remains steady this week. Good supplies and pricing remains steady. Quality is fair to good depending on growing region. Expect the market to remain steady going into next week.

## Herbs



Thyme, tarragon, & lavender remain limited this week due to the heat in the growing regions. Pricing has increased. Chervil is better this week, but remains limited. All other herbs have steady supply with good quality.

## Honeydews



Honeydews have been mostly steady with good supply and a nice spread of sizing between 5/6s. The market on the dewes should hold consistent over the next 7-10 days.

# MARKET OUTLOOK



## Iceberg



QUALITY



SUPPLY



Good supplies on iceberg lettuce for this week, with good demand. Salinas Valley is getting some warm weather that will cause some quality issues that will be apparent on the wrapper leaves. Fair quality is being reported at this time.

## Kale



QUALITY



SUPPLY



Steady supplies continue with green kale. Markets will also be steady going into next week. Good quality has been reported by multiple growers

## Leaf



QUALITY



SUPPLY



**Romaine Lettuce:** Good supplies this week. Demand is still high this week, Salinas Valley is getting some warm weather that will cause some seeder challenges for harvesting. There is more significant core with mature romaine. Processors are having to harvest younger fields to help prevent excess core going into salad bags. Quality is being reported as fair.

**Green Leaf/ Red Leaf/ Butter (Boston) Lettuce:** Very good supplies on the leaf lettuce this week. Quality is being reported as fair; reports of some fringe burn on the outer leaves due to warmer weather in the Salinas Valley. Markets are expected to be steady this week.

## Tender Leaf



QUALITY



SUPPLY



Good supplies continue to remain steady this week. Market is steady and expected to stay steady going into next week. Quality and production could be impacted by high temperatures resulting in occasional tip burn.

**MARKET ALERT**

QUALITY



SUPPLY



## Lemons & Limes



**ALERT: LIMES** The market is slowly improving on the smaller sizes. Large fruit such as 150ct still remains close to \$50 FOB or nonexistent. 175s-230s are \$30-\$40 and quality is struggling as well. Demand is strong and sources don't see any relief in the immediate future.

**LEMONS:** The market is remains steady on smaller fruit and higher on large fruit. Domestic supplies continue to be tight on larger fruit but should gradually increase over the next few weeks. Good supplies out of both the East and West coast with the majority being imports.

# MARKET OUTLOOK



## Onions



QUALITY



SUPPLY



The onion market remains steady from last week with yellows around \$7, reds around \$7, and whites around \$12. The NW regions continue with good supply & good quality. Some growing regions had some rain this week that interrupted the harvest and slowed down production. Expect markets to hold steady for the rest of this month.

## Onions, Green



QUALITY



SUPPLY



Good supplies continue coming from Mexico this week. Markets are expected to be steady to higher going into next week. Fair to good quality is being reported at this time.

## Oranges



QUALITY



SUPPLY



The market remains steady from last week. All FOBs in the teens, even on fancy fruit. Small sizes remain in high demand. Bigger fruit is most promotable. Quality is fair to good. Expect small fruit to remain tight until California navels start.

## Pears



QUALITY



SUPPLY



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.

## Peppers, Bell



QUALITY



SUPPLY



**Green Bell Peppers:** The market is steady this week with good supplies out of the Mid-West & NE. North Carolina & Tennessee are in steady production with SC & GA set to start anytime. Steady supplies out of Mexico & light supplies out of Baja California. Quality is good. **Red Bell Peppers:** Good supplies out of the Hollister/ Oxnard growing district and supplies are expected to increase as we move forward this month. Market continues to decrease this week with better supplies. **Yellow Bell Peppers:** The market has decreased this week due to better supply. Good supplies out of California and steady supplies are expected to continue. Mexican yellow hot house bell peppers are also crossing into San Diego & Nogales, AZ. Good quality is being reported.

## Peppers, Chili



QUALITY



SUPPLY



The market remains steady this week. Good supplies of chili peppers, Mexico continues with steady volumes on most varieties. CA's Santa Maria area continues to add to the mix until first frost or quality declines, whichever comes first. The East has consistent supplies out of MI & from various local deals.

# MARKET OUTLOOK



## Pineapples



The market remains steady this week. Supplies continue to improve out of both coasts on all sizes. Quality has also improved. Expect the market to remain steady the rest of the week.

## Potatoes



**ALERT:** The market is improving but markets are still at premium pricing, up to \$18. Most spuds have gone down about \$3 this week but remain higher than averages for this time frame. Sizing and yields remain a concern for the new crop as well. Availability good on the 60/70/80 size range. 40ct & 50ct remain in tight. #2 grade potatoes remain very tight. Expect supplies to improve once the new crop Burbanks start the first or second week of October.

**ALERT: SWEET POTATOES**– The market remains tight. Sweets have started rolling on both coasts in a small way, but we won't see huge relief for another couple of weeks.

## Squash



Both yellow & zucchini continue to be available in good supply throughout the country. The East has product from Canada to GA and all points in between. The West is slowly beginning to transition from a mostly CA deal to Mexican production. Santa Maria, Salinas, & Fresno are gradually lightening up but still have enough to go around. Baja has come along with Fall acreage & we're beginning to see crossings from growers in the northern areas of Mainland Mexico. Although there are some scattered issues with scarring/ scuffing on yellow, quality is nice from almost all areas.

## Strawberries



Strawberries continue to be a challenge this week. Both Santa Maria & Watsonville/Salinas experienced extreme heat over the last weekend. The excess heat impacted production & reduced yields. The light rain on Monday had a negative impact on production as well. This combination of heat & precipitation affected both quality & harvest projections. Expect to see softer fruit with bruising as well as moisture related issues such as mildew & premature breakdown in some of the berries. Expect the market to remain strong through next week.

## Tomatoes



Grape & cherry markets continue to weaken out West. Demand is light & supplies steady. Grape & Cherry markets out East are steady but demand is light. Round markets remain unchanged out East and in N. California with good supplies and steady demand. Mexican product is lower from last week on bigger product as demand is light. Roma markets are the same as last week with light to moderate supplies and good demand.



# MARKET OUTLOOK

## Tomato Suspension Agreement Signed Between United States and Mexico

Thursday, Sep. 19th, 2019 USA and MEXICO - The state of tomato trade between the U.S. and Mexico has seen a lot of ups and downs this year. In May, the U.S. terminated its longstanding Tomato Suspension Agreement with Mexico, which understandably generated considerable concern in the industry. A series of back-and-forth proposals have transpired since then, but now, for better or worse, a new agreement has been signed.

The new agreement was signed on September 19, following a long period of negotiations. The U.S. Department of Commerce agreed to suspend the anti-dumping investigation of fresh tomatoes from Mexico, according to a press release. The new agreement will reportedly include strong monitoring, enforcement, and anti-circumvention provisions. Border inspections are to be included as part of these measures, though those inspections will cover only around 66 percent of imported Mexican tomatoes. But officials are optimistic that the inspections will discourage the dumping of defective and low-quality tomatoes.

"Today's signing, while just the beginning, is a very good thing. It brings certainty to the marketplace after nearly a year of negotiations," Dante Galeazzi, President of TIPA, commented. "The deal may not be perfect for both sides, but what it does do is set the field for the next five years so that growers can plan and plant knowing what to expect and what the rules will look like. The next steps will be understanding implementation and effects of the new agreement, but for the American consumer this represents a win. Tomato connoisseurs will get both U.S.- and Mexican-grown tomatoes in the marketplace at affordable prices, all year long."

However, on the other side of the coin, the Fresh Produce Association of the Americas (FPAA) sees other challenges that this agreement has impressed upon them. "It is outrageous that Commerce used false justifications to introduce what essentially acts as a quota or volume control method," said Lance Jungmeyer, President of FPAA. "It is completely unnecessary to require USDA to conduct quality inspections on an item that has already demonstrated a historical pass rate of 99.76 percent."

The FPAA believes that the new agreement will continue to allow market access for Mexican tomatoes, but will harm importers. The association claims in its own press release that importers are likely to face increased costs and disruption to their businesses due to the controversial Border Inspection Mechanism, which the association describes as a technical barrier to trade.

There are mixed opinions on the agreement, from backlash by importers to protecting U.S. farmers from Mexico's tomato dumping

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"The United States has fought and fought for decades to reduce phony and unjustifiable non-tariff barriers to trade. Now that Commerce has pushed this inspection, other countries may be emboldened to push for similar restrictions on imports of U.S. foods into their countries," added Jungmeyer. "It is truly short-sighted."

The Florida Tomato Exchange (FTE) also weighed in on the recent agreement, viewing the new agreement as a positive development, and releasing a statement praising the efforts of the U.S. Department of Commerce and Mexican tomato exporters.

"This agreement, like any trade agreement, will only work if it is enforced. The FTE looks forward to working with the Commerce Department and the USDA to ensure that the agreement is enforced vigorously and to identify and stop all efforts to circumvent or undermine its provisions, especially the border inspection system. Today's signing is a step in the right direction to stop further injury to American farmers caused by dumped Mexican tomatoes," the statement reads.

Clearly, there are strong opinions on both sides, though we can all agree that we want what's best for U.S. farmers. Only time will tell how the new agreement will play out, but AndNowUKnow will bring you updates and the input of industry leaders.

SOURCE: <https://www.andnowuknow.com/shop-talk/tomato-suspension-agreement-signed-between-united-states-and-mexico-Lance-Jungmeyer-Dante-Galeazzi/maggie-mead/64916>

**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!**

Your Dedicated NPC, LLC Staff

