



Crop Report - August 23, 2023

Greetings to all of our customer partners:

Welcome to our August crop report!

Despite some unusual stops and starts, the weather has overall been favorable in the Pacific Northwest and California's San Joaquin Valley, resulting in some good-sized crops so far this season. If patterns continue, and California can maintain warm weather through October, all crops will be on the positive side over last season and in good supply.



Vibrant reds in the 2023 California tomato fields



PNW Bartlett Pears, June 30, 2023

California Tomatoes

The 2023 tomato harvest began about 3 weeks late this year (mid-July) in our southern Kern County growing region, approximately 20 miles south of Bakersfield, CA. Early yields were mixed due to the cooler start to the season & very wet transplant period. But by the time we moved into the second and third weeks of production, we began to see higher yields and vibrant reds; the color has been excellent!

As our harvest has moved north into Fresno County the quality has remained very good and the yields have increased. As of now, we have seen little disease or pest pressure in our tomato fields and we're hoping this trend continues throughout the season. We are seeing the effects of the abundant rainfall that our growing regions received this past winter/spring and are happy to report the tomato fields look healthier than they've looked for several years.



Regarding Hurricane Hillary, as of today, aside from some intermittent rain the last few days and a few muddy slowdowns in the south, the weather was mostly south and east of our primary tomato region.

The CTGA has determined the price for organic tons for 2023 will be \$190 ton (please see addendum on page 8).

Dates	2022	2023
9/15 – 9/21	\$2.00	\$3.00 per net ton
9/22 – 9/28	\$4.00	\$5.00 per net ton
9/29 - 10/5	\$8.00	\$10.00 per net ton
10/6 – 10/12	\$12.00	\$14.00 per net ton
10/13 - end	\$16.00	\$18.00 per net ton

The chart to the right is provided courtesy of the CTGA and you'll note the 72% increase in price per ton since 2020.

If you have not booked or contracted your needs with us, please do so promptly so we can make sure we get you packed! For those of you who opt not to contract, product is available on a first come, first served basis.

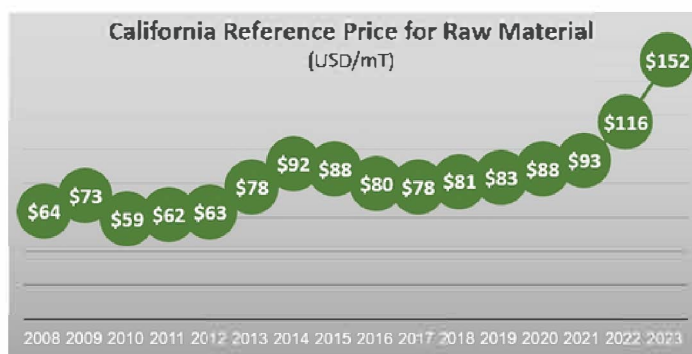


Image courtesy the CTGA

Pacific Northwest Fruit



Packing Dark Sweet Cherries at Northwest Packing, July 2023

Cherries

The Northwest cherry crop started and should finish strong this year. Consistent temps in the 80s during the crucial growth period, with little moisture during harvest will create a significant “bounce back” crop from 2022 (frost wiped out much of the 2022 cherry orchard crops).

The 2022 pack yielded about 13.3MM boxes, and though the final numbers are not in yet, 2023 should finish above 20MM boxes this season.

The most significant challenge this year was a compressed harvest. Nearly twice the normal capacity was ripe at the same time while harvesting. But overall, a great crop!



Pears

The quality and size of our 2023 Hood River, Salem and Medford, OR Bartlett pears look to be very favorable this year! After generous rain this winter, Medford, OR finally saw their reservoirs full again (see Emigrant Lake photo comparison) .

Hood River and Salem have good crop volume and great size heading into harvest, which started the week of August 14th in Salem.

Overall, we see a strong Northwest pear crop, surpassing 2022 by at least 10-15%.



Emigrant Lake, Medford, OR



PNW Pears, 2023

Plums

“Final bloom drop” happened in the Salem, OR plum orchards in July indicating we'll likely have an above average crop volume for our delicious and nutritious Italian Plums in 2023.

Fruit quality, overall, looks great and the plums are starting to change color. We anticipate a harvest of 22-2400 tons, about a 30% increase over 2022 and are scheduled to start harvest mid to late September. Inventories look strong, place your bookings now for 24/300 Retail size or 6/10 Foodservice/Healthcare product.



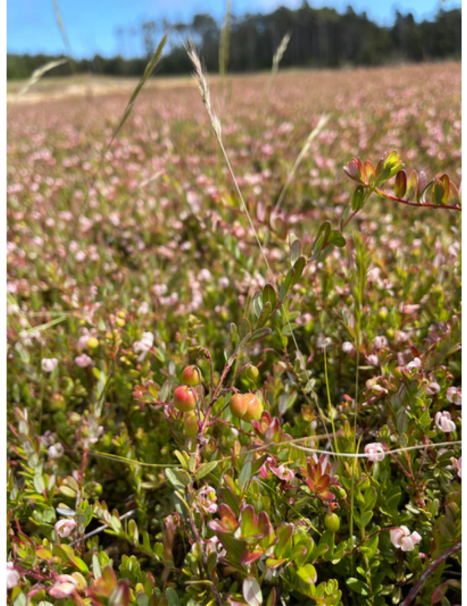
PNW Italian plums, 2023



Cranberries

Bandon, OR has had ideal growing conditions this season and is back on track to produce an average crop volume for 2023. Like most other commodities in the PNW, we are tracking about 10 days behind standard harvest dates (we are currently scheduled for some early variety-harvest the last week of September). The bloom was heavy in June and the weather has cooperated nicely to produce a very good berry count per acre. Now, time will only tell if the berries size up.

Our Northwest berries are prized by nutraceutical companies for their polyphenols, phenolic acids and unusually high values of PAC (Proanthocyanidins). We provide retail and foodservice cannery products in both conventional and organic varieties. Additionally, we process for industrial juice concentrates, essences and pomace.



Cranberries in Bandon, OR, 2023



PNW Marionberries growing on the vine, 2023

Pacific Northwest Berries

All other PNW berries have looked great this year. With lower temperatures, we've been able to retain both good quality and size.

Blackberry, Strawberry, Raspberry and Marionberry have already finished harvest and delivered a strong volume. At this stage, we'll be wrapping up the remainder of the late season blueberries this month. We've had some intermittent heat above 100F, but fortunately most of our crop quality and quantity has been favorable.



Costs

As you can see below, most costs have yet to see any real reduction from earlier inflationary increases. Utilities, warehousing, transportation, fiber, sweeteners, tinplate and particularly spices and olive oil remain at their highest levels in a decade.

Poor weather and drought have pushed the largest olive oil producing country, Spain, to record pricing levels not seen since 1996.

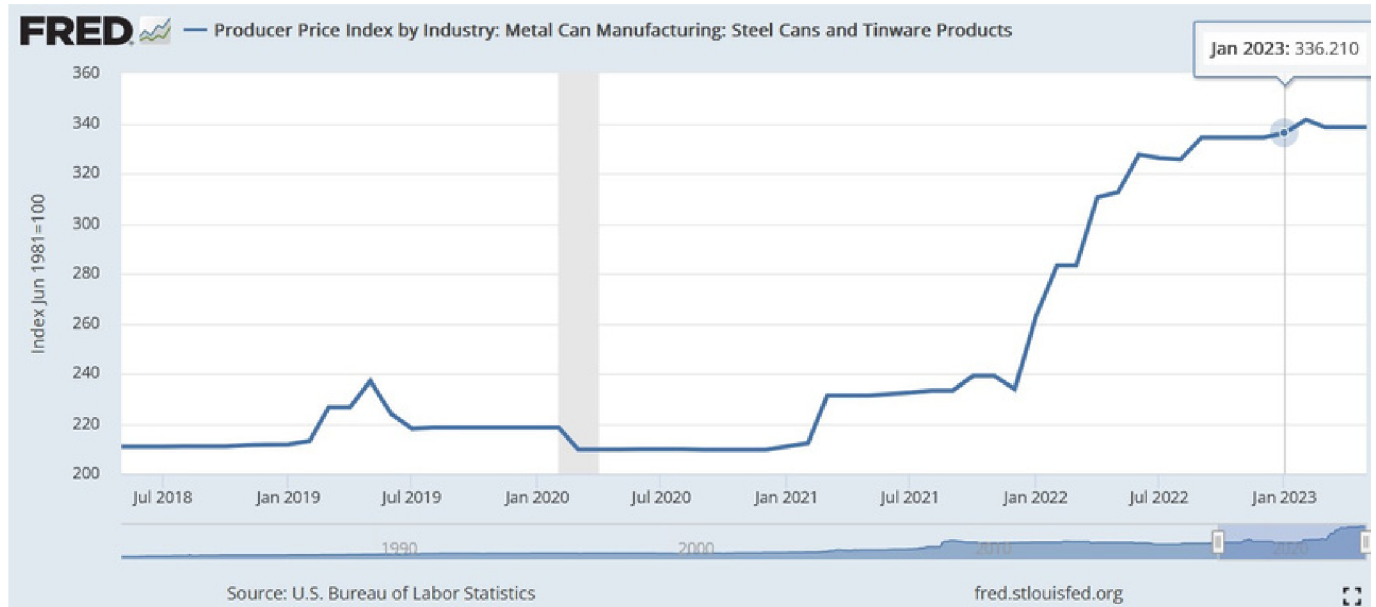


Figure 1: Steel & Tin Prices 2018-2023

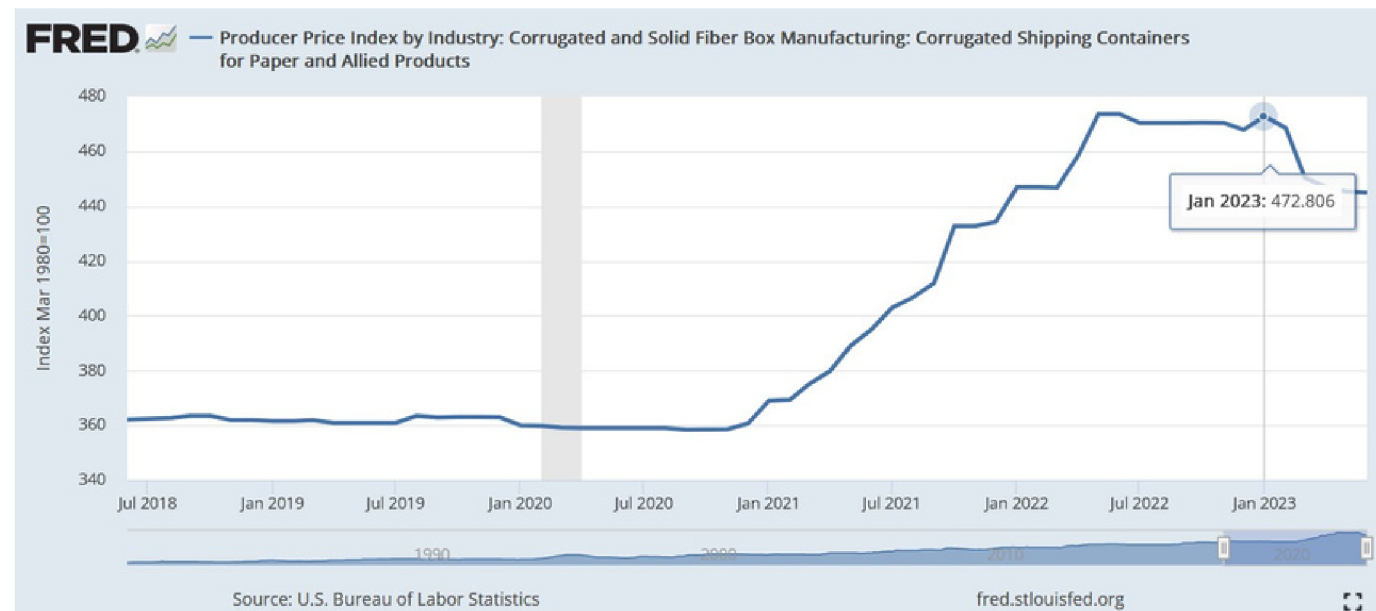


Figure 2: Fiber Prices 2018-2023

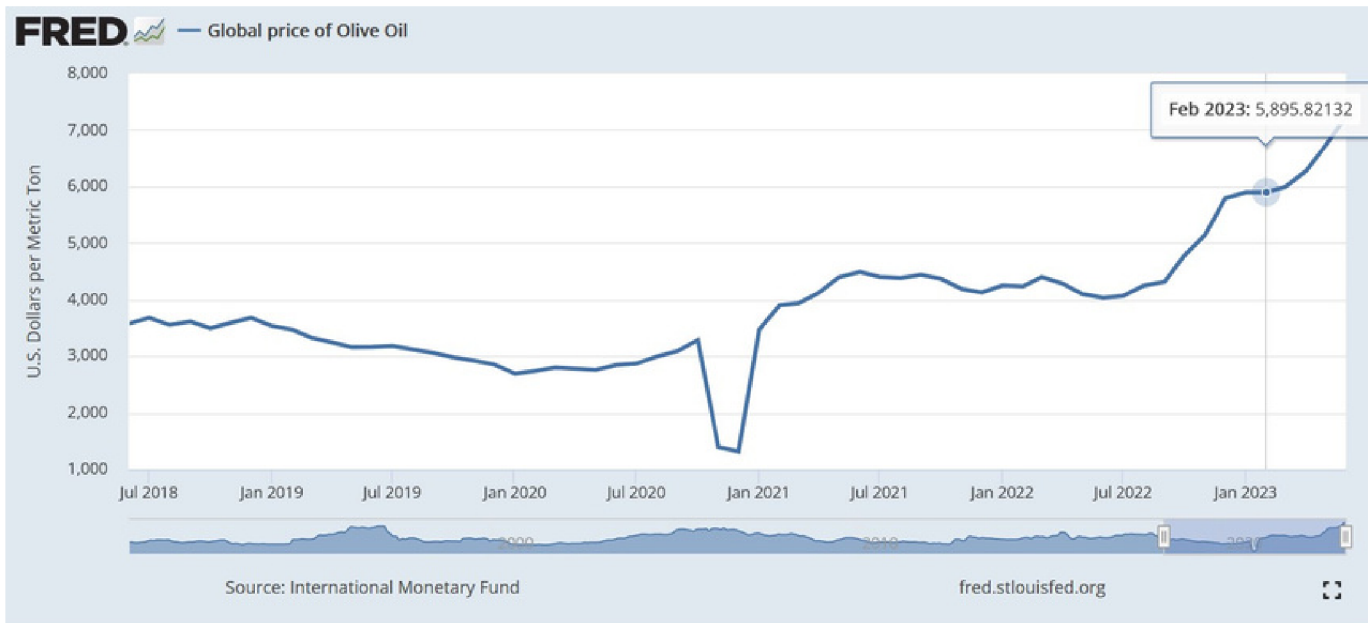


Figure 3: Olive Oil Prices 2018-2023

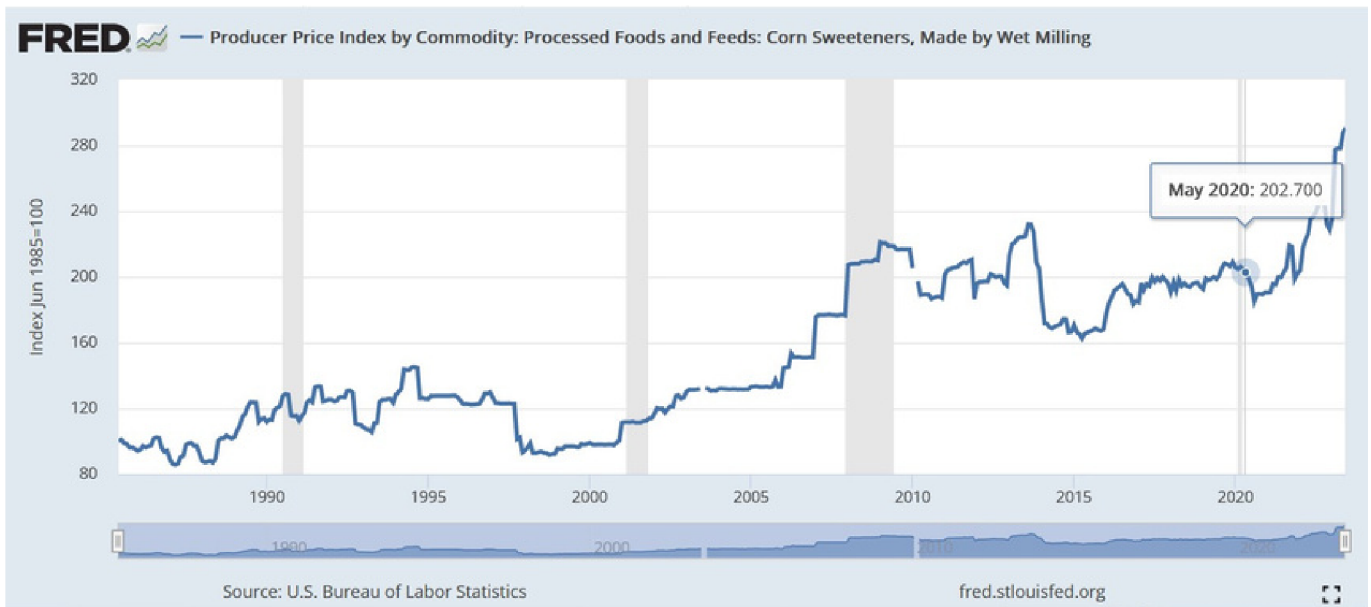


Figure 4: Corn Sweeteners Prices 1980-2023

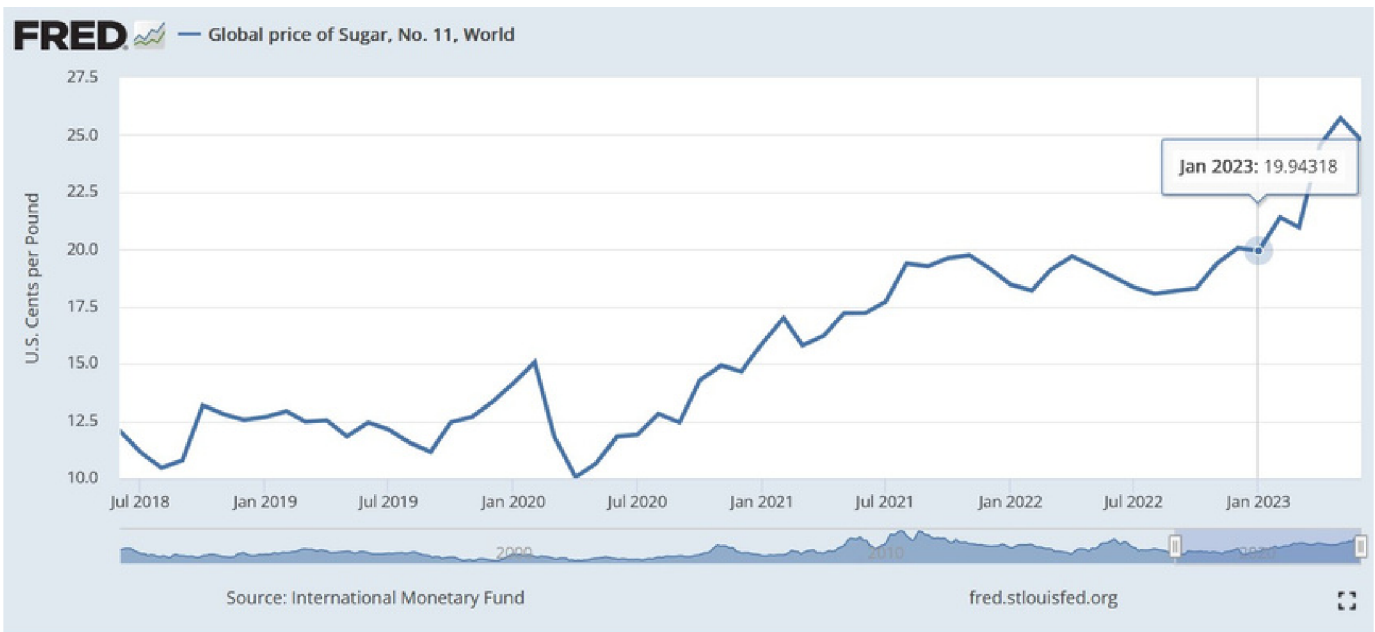


Figure 5: Sugar Prices 2020-2023

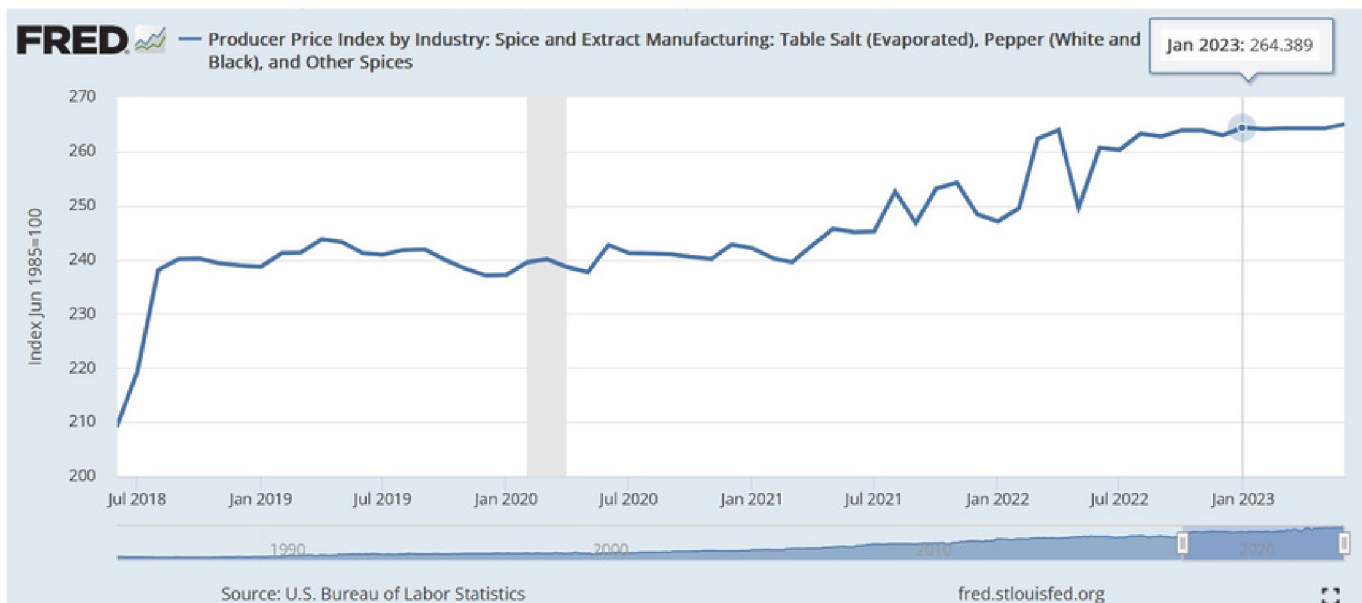


Figure 6: Spice & Extract Prices 2018-2023

As always, we remain enthusiastic about the year ahead and are thankful for the favorable weather & for all of our Northwest and California growers. With their hard work and expertise, we continue to do our part to process some of the finest, fresh fruit and tomatoes this country has to offer. This year will be another year for us to sharpen our skills, increase efficiencies and to ensure we're delivering the NJFC quality you depend on for your customers and families.

Thanks again for your partnership and we send our best to you in the year ahead!

The Neil Jones Food Family





Tomato

TOMATO BULLETIN

June 1, 2023

In this issue:

- 2023 Organic Price Agreement

Dear Tomato Grower:

2023 Organic Price Reached with the following Processors:

The CTGA has agreed to **\$190 per ton** with:

- Campbells Soup Company
- ConAgra Brands, Inc.
- Del Monte Foods, Inc.
- Escalon Premier Brands, Inc.
- Ingomar Packing Company
- Los Gatos Tomato Products
- Neil Jones Food Company

The organic agreement includes same excess tonnage clause as last year and is the following:

- Excess Tonnage: Canner and Member will mutually agree on the minimum tons per acre of organic tomatoes to be purchased by canner. Canner has first right of refusal to purchase any excess organic tons at the price set forth in this agreement. With respect to any excess organic tons that Canner does not purchase on these terms. Member has the right to try and sell such excess tonnage to another buyer for organic price. For any excess tonnage Member cannot sell another buyer of organic tomatoes, Canner will buy all such unsold excess organic tonnage at the 2023 price negotiated between the Association and Canner for conventional processing tomatoes.
- The remaining terms are the same as the previous year.

We will continue to negotiate with Morning Star to reach resolution on the 2023 Organic Price.

Questions or comments?

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United States Department of Agriculture
National Agricultural Statistics Service



2023 California Processing Tomato Report

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Released: May 31, 2023

As of May 15, California's tomato processors reported they have or will have contracts for 12.7 million tons of processing tomatoes for 2023. This production estimate is 2.4% higher than the January intentions forecast of 12.4 million tons and 21.4% above the final 2022 contracted production total.

The May contracted acreage of 254,000 is 2.4% above the January intentions forecast of 248,000 acres and 24,000 acres more than last year's final contracted acreage.

Fresno County remains the top California county in contracted planted acreage for 2023 with 62,300 acres. Yolo, Merced, San Joaquin, and Kings make up the remaining top five counties, accounting for 63.8% percent of the 2023 total contracted planted acreage for California.

After three years of drought conditions, heavy winter storms brought an unprecedented amount of rain to the state, flooding areas in the Central Valley. Fields were wet and muddy well into spring, preventing farmers from planting on schedule. Transplanting continued through May and temperatures remained cooler than normal, resulting in a lag in crop maturity. There is concern that harvest will not be staggered enough for a balanced flow of tomatoes to the canneries. Despite the setbacks, the availability of water and another increase in price agreements have encouraged producers to contract the highest number of planted acres since 2016.

This early processing tomato estimate is funded by the California League of Food Producers.

ACREAGE AND PRODUCTION (CONTRACT AND TOTAL) - CALIFORNIA

Year	Total crop			Contract only			
	Planted	Harvested	Production	Planted	Harvested	Production	
	<i>acres</i>		<i>tons</i>	<i>acres</i>		<i>tons</i>	<i>metric tons</i>
2006	283,000	282,000	10,104,000	280,000	279,000	10,024,000	9,094,000
2007	301,000	296,000	12,082,000	298,000	293,000	11,965,000	10,854,000
2008	281,000	279,000	11,822,000	278,000	276,000	11,691,000	10,606,000
2009	312,000	308,000	13,314,000	308,000	304,000	13,148,000	11,928,000
2010	271,000	270,000	12,297,000	269,000	268,000	12,212,000	11,079,000
2011	255,000	250,000	11,941,000	254,000	249,000	11,900,000	10,796,000
2012	260,000	258,000	12,640,000	258,000	256,000	12,540,000	11,376,000
2013	263,000	260,000	12,100,000	259,000	256,000	11,900,000	10,796,000
2014	292,000	289,000	14,010,000	291,000	288,000	13,965,000	12,669,000
2015	299,000	296,000	14,361,000	297,000	295,000	14,307,000	12,979,000
2016	262,000	258,000	12,647,000	260,000	256,000	12,527,000	11,364,000
2017	230,000	222,000	10,464,000	229,000	221,000	10,407,000	9,441,000
2018	241,000	236,000	12,284,000	235,000	230,000	11,994,000	10,881,000
2019	235,000	228,000	11,186,000	234,000	227,000	11,130,000	10,097,000
2020	234,000	228,000	11,312,000	234,000	228,000	11,312,000	10,262,000
2021	230,000	228,000	10,775,000	229,000	227,000	10,739,000	9,742,000
2022	231,000	225,000	10,496,000	230,000	224,000	10,464,000	9,493,000
2023	(NA)	(NA)	(NA)	254,000	(NA)	12,700,000	11,521,000

(NA) Not available.

CALIFORNIA PROCESSING TOMATOES BY COUNTY

County	Contracted and Open Market - 2022 Crop				2023 Crop
	Area planted	Area harvested	Yield per acre	Production ¹	Contracted acres
	<i>acres</i>		<i>tons</i>		
Butte	860	860	54.4	46,800	1,310
Colusa	12,700	12,400	50.2	622,700	16,300
Contra Costa	3,000	3,000	57.6	172,800	3,300
Fresno	53,000	50,000	47.3	2,364,000	62,300
Glenn	800	800	41.1	32,900	1,690
Kern	10,300	10,200	54.9	559,600	16,400
Kings	28,800	28,200	54.2	1,529,000	17,600
Madera	4,500	4,400	43.3	190,600	5,300
Merced	24,700	24,600	44.2	1,086,000	27,000
Monterey	850	850	52.6	44,700	1,320
Sacramento	4,100	3,800	33.6	127,700	9,900
San Benito ²	940	740	35.0	25,900	(D)
San Joaquin	18,500	18,300	43.0	787,100	20,900
Solano	11,800	11,600	37.8	439,000	13,900
Stanislaus	9,000	9,000	44.3	398,800	6,700
Sutter	9,800	9,600	39.0	374,800	12,300
Tehama	270	270	43.3	11,700	370
Yolo	34,600	33,900	45.6	1,544,000	34,300
Other Counties ²	2,480	2,480	55.6	137,780	3,110
Total	231,000	225,000	46.7	10,495,880	254,000

¹ On the basis of "paid for tonnage" purchased from growers as reported by processors, dockage not included.

² To avoid disclosure of individual operations, "Other Counties" includes:

2022: Santa Clara and Tulare.

2023: San Benito, Santa Clara, and Tulare.

(D) Withheld to avoid disclosing data for individual operations.

California publications are available
free-of-charge on the Internet at: www.nass.usda.gov/ca