



# Pacific Coast Producers

## 2024 CROP REPORT

October 2024 | Issue No. 9

### Apples

The Pacific Northwest apple harvest is in full swing with growers reporting a lighter crop than originally estimated. PCP has already received and run their initial tonnage for the fall apple run with good quality overall.



### Apricots

*Harvest start date 6/10/24. Harvest end date 6/28/24.*

Overall fruit quality was good but throughout harvest we did see General defects a little higher than normal. We also had a windier than normal year in the Patterson/Westley area which caused the majority of defects. Growers embraced two picking their blocks which definitely helped with quality. Over ripeness, which typically is hard to avoid toward the end of harvest, never really got that bad this year. Still way too early to predict but apricots have been in an alternating cycle and with 2024 being on the shorter side, we could see a larger crop in 2025.

### Grapes

*Harvest start date 7/26/24. Harvest end date 8/29/24.*

Overall fruit quality was just okay. Small berry size was the main issue. With extended heat in June and July grapes just did not gain size like they typically do. The grape harvest went pretty smoothly, and we were able to keep our cold storage inventory low until the last two weeks of harvest. All growers reached their required tonnage to meet pack demand. We are hoping 2025 will bring larger berries as well as the desired tonnage to meet our pack plan.

### Tomatoes

*Organic harvest start date 7/7/24. Harvest end date 8/6/24.*

*Conventional harvest start date 7/18/24. Harvest end date 10/3/24.*

Overall fruit quality was fair to good. It could be also said that the fruit quality was better than expected. Field yields were average to slightly below average for the most part. A major challenge for the 2024 season was a stretch of extreme heat in late June through late July early August affecting the crop in both yields and quality. As it turned out the quality was acceptable and the yields were not as severe as expected. Fields for the 2025 season are bedded up and ready for next season.

### Cherries

*Harvest start date 6/7/24. Harvest end date 7/31/24.*

The crop was down from last year and we scrambled to get our quantity target. The crop reduction was due to a January freeze, in northern Washington, that killed many cherry buds. While the overall Northwest crop was down the crop in the Willamette Valley, where we source a significant amount of our field run fruit, was average or better making up some of the NW shortfall. The quality this year was outstanding. There are few defects, and the stem retention was above average. Our growers had adequate labor to start harvest on time, and to keep up with the crop maturity.

The weather was close to ideal from bloom to the end of harvest. We had mild temperatures with rain when the crop needed it to boost the size of the cherries and not crack them. The daily temperatures were mild, apart from one week with too much heat at harvest. If we were to repeat one season over and over for all the good weather and orderly harvest, this would be that year.

## Pears

*Conventional harvest start date 7/16/24. Harvest end date 9/6/24.*

### River/Linden Pears

The 6-week, prolonged bloom took its toll on the pears this season. The mixed maturity at harvest had growers delaying picking as long as they could in hopes that the later blooming fruit would gain size. Some growers went through and picked the bottoms of the trees first and went back in and picked the tops later in the season. Growers battled the mixed maturity all season long. This yielded below average tonnages. Fruit quality was adequate, with no major issues. The River district came in at 87% of contracted tons. The Linden district was 24% of contracted tons. Growers will start pruning their orchards, late fall to early winter once the trees start losing their leaves.

### Mendocino/Lake Pears

Early low bud counts and prolonged bloom in Mendocino County led to a short crop. Mendocino came in at 58% of contracted tons. Fruit quality was adequate. Lake County growers were optimistic early in the season as their bloom was more compact than the other districts. Unfortunately, the fruit size was small. Lake County came in at 71% of contracted. Growers in these districts did a better job this season in sending in cleaner loads. Overall, growers delivered 81% of their contracted tons, which was still enough to meet demand plans.

### Pacific Northwest Pears

The Pacific Northwest pear was light, similar to CA. However, PCP was able to acquire our full contracted tonnage from our grower base in the Pacific Northwest.

*Organic harvest start date 7/27/24.  
Harvest end date 8/31/24.*

### Organic Pears

The organic pear crop ended up being a little short. One orchard had too much hail damage to harvest. However, we managed to acquire enough to fulfill the pack requirement.

## Peaches

*Conventional harvest start date 6/14/24. Harvest end date 9/6/24.*

### Northern Peaches

The peach crop of 2024 in the North was challenging regarding the size of the fruit. From Loadel through Late Ross, we observed peaches lacking in size due to extreme, long heat during the month of June when the peaches were in critical growth stages. Another reason for the fruit being small is because we had a heavy set across most varieties. Despite the size challenge, the majority of the crop came out clean with minimal defects. Bruise and overripe did show up early in the season, but growers quickly adjusted once we got into the early varieties.

Extra Early varieties garnered 11.6 Tons/Acre (TPA), Early Varieties 14.5 TPA, Late Varieties 17.0 TPA, and Extra Late varieties 16 TPA. The small fruit that was in all varieties hampered production efficiency for growers and the plant as well. Growers had to sort heavily with many small peaches being sorted out. Despite the size challenges, growers persevered and made sure they brought the cleanest fruit they could offer for our canneries.

In preparation for next year, growers have already done their first hedging and topping of the trees and growers with non-bearing orchards are

manually trimming the trees to promote a strong structure so that trees do not break if there is too much weight from the fruit. Some PCP members/growers are pulling older orchards and replanting to maintain tonnage production. Growers and the North field team look forward to the next harvest.

### Southern Conventional Peaches

In 2024, we experienced relentless heat that reached over 100 degrees for more than a 3-week period. This heat had an impact on the peaches that caused mixed maturity and size problems. The Extra Early varieties experienced some heat damage and sizing issues where the later varieties experienced a slowdown in ripening and sizing. The heat compromised the quality of the peaches to where the fruit didn't hold up well after it was picked. We had growers who one-picked, two-picked and even three-picked because of the mixed maturity. Some growers went back and re-thinned orchards trying to size their fruit. Unfortunately, no matter what we did in the field to try and combat the heat it didn't translate into better yields in the plant. Even though we had huge sort outs in the field, growers still managed to deliver a decent quality and quantity of fruit. The south delivered 43,936 net tons of peaches equating to an overall 18.4 tons per bearing acre.

While we had plenty of challenges, there were a few successes as well. Growers who normally one-pick their orchards two-picked or even three-picked to deliver the best quality fruit. Growers who went back and re-thinned orchards were able to size fruit that wouldn't have sized otherwise. On super-hot days we changed the way we shipped fruit to protect the quality of the fruit. We were able to convince more growers to pick their Ross and Late

Ross on the firmer side to improve quality. Currently, some growers have started pruning their orchards getting ready for the next crop. Field staff have been working on picking up broken bins, collecting empty bins and cleaning up receiving stations.

Organic harvest start date 6/7/24. Harvest end date 9/2/24.

### Organic Peaches

The organic peaches experienced a lot of the same issues the conventional peaches faced. Some of the organic blocks struggled with size more than usual. We were able to stay on top of the ripe fruit and two pick when necessary. We picked the Ross and Late Ross earlier than normal with a one pick to stay ahead of the heat and fruit maturity. We received 5,028 net tons of organic peaches. This is an 18.52 tons per bearing acre.

# Imports

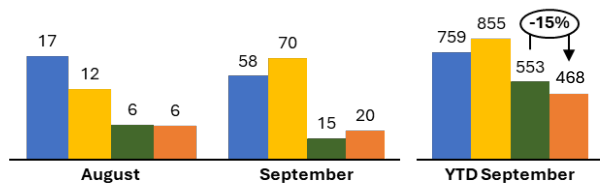


## Market Overview : Global Processed Pineapple Supplier

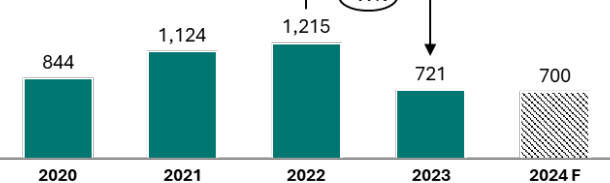
### 1 Thailand

Thailand Pineapple Tonnage for Processing and Fruit Price (in '000 MT)

■ 2021 ■ 2022 ■ 2023 ■ 2024 Actual

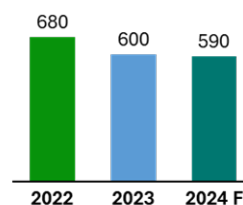


■ Yearly Volume ■ 2024 F



- 2023 – The lowest harvesting output
- YTD September 2024 – The lowest YTD achievement in the last 5 years. The total output is 468K MT, which is 15% lower than the same period last year.
- Thai raw material average price is around THB 12.5 – 13.5/kg in September.

### 2 Indonesia (GGP)



- Due to El Nino, there has been almost no rainfall since Aug 23 till Jan 24.
- Rainfall began to arrive during Feb 24, although still According to climate models, sea surface temperatures in the central tropical Pacific are expected to return to ENSO-neutral later in autumn 2024 to El Nino effect.

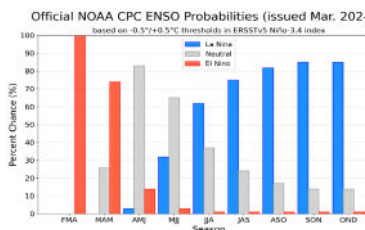
### 3 Kenya

- Kenya has only MD2 varieties (Fresh Fruits varieties) for canning.
- From 2024, it is estimated that the harvesting output will remain on the lower side, ranging between 100K - 130K MT.

### 4 Philippines

- Year 2024 - Philippines is also affected by El Nino, so they also experience dropped in their annual production supply (Est 10-15% less than their normal supply of 1.1 million MT)
- There are two major packers with their own premium brands i.e. DOLE and DEL MONTE. Naturally, Philippines main markets are US, Asia Pacific and domestic market under their own premium brand (Dole, Del Monte and S&W)

### 5 Weather Outlook

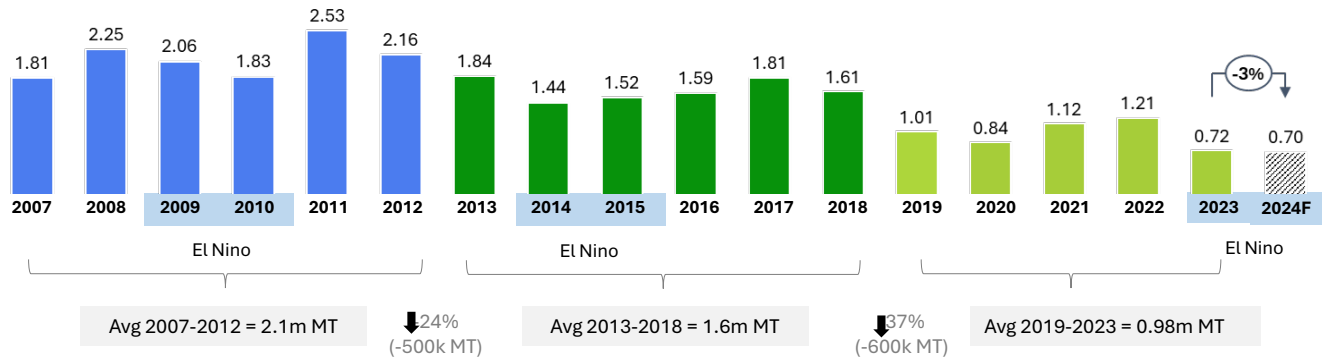


El Niño is near its end. According to climate models, sea surface temperatures in the central tropical Pacific are expected to return to ENSO-neutral later in May 2024.

# Imports Continued

## Thailand Pineapple Industry is in consolidation stage with apparent downtrend in volume

Thailand Processed Pineapple Tonnage  
(in mio MT)



### Main Points

- Average volume for 2019-2023 is lower by approximately 600k MT (-37%) compared to previous 6 years (2013-2018).
- Unlike other crops such as mango, jackfruit, rubber, etc. (where farmers planted only once for many years), Pineapple is a labor- and capital-intensive crop.
- The minimum wage in Thailand had risen by 68% (from 203 Baht/day to 341 Baht/day) in the last 13 years (2009 to 2022). With Thai new election results, the minimum wage is expected to go up significantly to 450 Baht by year 2024.
- 10 canneries closed in the last 10 years, on average 1 cannery every year. Thai pineapple industry business model of relying on supply from the farmers proved to be difficult to sustain.
- Consolidation of pineapple industries in Thailand:  
 23 Canneries (2011) → 19 Canneries (2017) → 13 Canneries (2021)

## Keep in Touch!

With the passing of the seasons each year, our orchards, fields, and vineyards cycle through their life stages to produce high quality product for harvest. It is up to Mother Nature and the hard work of the farmers and their crews to make harvest possible year after year.

Thank you for keeping in touch with us throughout 2024. Please continue to stay connected with us!

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*Can Fan Community*



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