



WEEK 43: October 23 - October 29, 2023

MARKET OUTLOOK

Transportation:

National Diesel Average: \$4.444

Compared to Last Year: \$3.549

National Fuel Surcharge: \$0.58

Shortages: Seeing high freight rates, with **extreme** shortages - None; **slight** shortages - None

Regional Weather Update:

Oxnard, CA: Partly cloudy and sunny skies with highs in the 70s and lows in the 50s.

Salinas, CA: Partly cloudy with highs in the 70s and lows in the 50s.

Yuma, AZ: Sunny skies with highs in the 80s and lows in the low 60s.

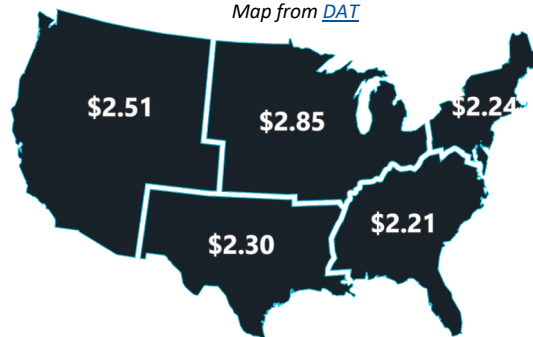
Immokalee, FL: Sunny and partly cloudy skies with highs in the 80s and lows in the 60s.

Idaho Falls, ID: Partly cloudy with highs in the 50s and 40s and lows in the upper 40s to low 30s with AM showers on Monday.

National Posted Rate per mile

previous week's average outbound reefer rate for each region

Map from [DAT](#)



MARKET ALERT

Banana

Beans: Green Beans & Snow Peas

Berries: Blackberries & Blueberries (Force Majeure)

Broccolini

Brussels Sprouts

Carrots

Cauliflowers

Cilantro

Citrus: Lemons, Limes & Oranges

Grapes

Mushrooms

Pepper Chili

Pineapples (Radar)

Tomatoes: Cherry & Grape

MARKET OUTLOOK

Apples



SUPPLY
GOOD
QUALITY
GOOD

The Washington State Apple Crop is experiencing strong growth and good supply, with an estimated 2023 crop of 134 million boxes, compared to 110 million this past season. The size profile benefits the foodservice industry, with a peak of 100/113ct and more 125s than 88ct. All varieties, from Red Delicious to Cosmic, have seen substantial gains, resulting in better value and availability throughout the season. Summer 2024 won't bring Gr Smith's prices to Washington like they did recently. The growing conditions have been ideal, and no weather issues have been reported.

Asparagus



SUPPLY
GOOD
QUALITY
FAIR

Asparagus productions are light from Mexico causing market to be escalated. The short season is projected to last until October/November, nearing its peak. Peruvian volume has decreased due to field transitions and increased demand from Europe. Trujillo and Ica are producing and expected to continue until the end of the season.

Avocados



SUPPLY
GOOD
QUALITY
GOOD

Last week's avocado volume was the lowest in 2023, with 38.4M lbs., a significant drop from the previous week's 60M lbs. The rain significantly reduced harvesting last week and resulted in an empty pipeline. The rain has stopped, and harvest has been strong this week. Loca Crop and Aventajada have similar dry matter, with a recommended storage temperature of 44°F. With plenty of volume left on the trees, and once the pipeline is filled, November and December will be a great time to promote avocado.

MARKET ALERT

Bananas



SUPPLY
FAIR
QUALITY
GOOD

The demonstrations in Guatemala are causing roadblocks, affecting movement within the country. However, the situation is improving, with fruit possibly being a color stage behind the desired ripeness due to delays in transportation.

MARKET ALERT

Beans



SUPPLY
GOOD
QUALITY
FAIR

Green Beans: Supplies continues to be limited. The market will remain elevated for the next 2-3 weeks. Beans are transitioning to Florida. Hurricanes impacted the growing regions of Georgia and Mexico, resulting in crop losses. Production and volume are expected to be limited and challenging until the end of October. Volume is expected to increase in November for the Thanksgiving holiday.

Snow Peas: Supplies are improving with fair to good quality in the west. Supplies are scarce in the east due to protests in Guatemala, which are preventing any containers from leaving.

MARKET OUTLOOK

MARKET ALERT

Berries



SUPPLY
BAD
QUALITY
FAIR

Blackberries: **ALERT** Prices for Blackberries are trending down. Production is coming out of Mexico. Supplies remain tight. The impact from Hurricane Lidia could put more pressure on supplies during the weeks to come.

Blueberries: **FORCE MAJEURE** Prices for Blueberries are trending up. Production is coming out of Mexico and the volumes aren't covering consumer needs. Production out of Mexico is currently down 30-50%. Production out of Peru is down 50%. The market is expected to remain tight through late December when imports out of Chile arrive.

Raspberries: Prices for Raspberries are trending down. Production is coming out of Watsonville and Mexico. Growers are reporting good quality out of both growing areas.

MARKET ALERT

Broccoli



SUPPLY
GOOD
QUALITY
GOOD

Broccoli: Supplies have improved with strong demand. Supplies are available from Salinas, Santa Maria, and Mexico. Growers are reporting steady yields this week. Market pricing has also improved, and supplies should continue improving in the next few weeks. Prices will not be escalated this week. (F.O.B. pricing for this week \$16.00 - \$17.00)

Broccolini: **ALERT** Supplies continue to be light. Demand has increased. Supplies are expected to be limited for a few weeks. Growers are reporting brown bead and flowering defects. Market pricing continues to be escalated. (F.O.B. pricing for this week \$26.55 - \$30.75)

MARKET ALERT

Brussels Sprouts



SUPPLY
FAIR
QUALITY
FAIR

Supplies continue to be light with fair quality. Demand is strong. Market pricing and contracts will remain escalated. Supplies will remain light causing markets to remain high and prices continue to remain escalated. (F.O.B. pricing for this week \$44.00 - \$46.00)

Cabbages



SUPPLY
GOOD
QUALITY
GOOD

Supplies are steady with good quality. Growers are reporting better availability. Market pricing has improved. Products are coming from Salinas and Santa Maria. (F.O.B. pricing for this week \$15.00 - \$17.00)

Cantaloupes



SUPPLY
GOOD
QUALITY
GOOD

California is done and fully transition to Yuma. Cantaloupe production in Yuma is experiencing smaller sizing than anticipated due to high temperatures and limited availability on larger sizes. 9ct and larger are limited. Quality has been good, with a slightly greener caste than expected from California. Brix levels are 11-14%, causing a temporary demand exceeds supply situation. Florida will follow the second week of November.



MARKET OUTLOOK

MARKET ALERT

Carrots



SUPPLY
GOOD
QUALITY
GOOD

Mexico's carrot region is facing challenges due to water and germination issues, causing crop losses and further complicating the domestic market. California and other regions are also facing weather-related challenges, with jumbos and cellos in low supply. Prorates may be expected, and table carrots may be a good substitute. Tropical storm Hilary disrupted plantings in Imperial Valley & Riverside County, California, and Kern County, California, causing a week delay in planting and reduced yields. Hurricane Idalia's devastation in Georgia has significantly affected carrot farms, potentially impacting January volume.

MARKET ALERT

Cauliflower



SUPPLY
FAIR
QUALITY
FAIR

Supplies continue to be limited with fair quality and increased demands. Supplies are available from Salinas, Santa Maria, and Mexico. Supplies will be light but are expected to improve next week. Summer defects and weather cause delays and lower yields. Quality is reported as fair but is expected to improve. (F.O.B. pricing for this week \$27.00 - \$29.00)

Celery



SUPPLY
FAIR
QUALITY
FAIR

Supplies are steady. Supplies are currently coming from Salinas and Santa Maria. Market pricing has improved compared to last week. Summer defects and slight presence of insect damage. Supplies and prices will be steady for the next few weeks. (F.O.B. pricing for this week \$14.00 - \$16.00)

MARKET ALERT

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: Cost continues to be elevated, especially on large fruit. There's a significant price spread across the size spectrum; the lime market is expected to stay escalated. The new bloom has caused a significant pricing gap across the sizing spectrum, with potential record-breaking numbers compared to historical trends in Q4. Extreme heat and humidity have also affected quality and shelf life, leading to low availability. Peak sizing currently consists of small fruit, 230s and 250s, accounting for 70% of total harvested yields. Consider expanding your specification to accommodate crop trends and ensure supply.

Lemons: Lemons have been tight all summer from all regions. Chile, Argentina, and Mexico have been covering but are struggling to maintain a constant weekly supply. Overall supply is expected to continue to be tight going into November with the market being high. If loading oranges out of Florida is feasible, import lemons can be shipped to Florida, allowing trucks to load both. This will require some planning, so keep in touch with your supplier.

Oranges: Valencia 88's and smaller are very tight. Valencia is expected to be done while Navels are delayed until the first or second week of November due to weather. An eminent crop gap is occurring. There are options out of Florida but recommend subbing with grapefruit.

MARKET OUTLOOK



MARKET ALERT

Corn



SUPPLY

FAIR

QUALITY

FAIR

Prices for Corn are trending up. Eastern corn has tightened up due to hurricane activity a few months ago. Out West, supplies continue to get tight as production transitions to Arizona.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Slicing Cucumbers are trending up. Production out of the East is coming out of Georgia, New York, and Tennessee. Local programs are winding down. Production out of the West is ramping up out of Mainland Mexico.

Garlic



SUPPLY

GOOD

QUALITY

GOOD

Domestic garlic has improved with steady supplies. Quality is good and the price remains elevated.

Ginger



SUPPLY

FAIR

QUALITY

GOOD

The market for imported ginger is active, and supplies are light.

MARKET ALERT

Grapes



SUPPLY

FAIR

QUALITY

GOOD

Hurricane Hilary has caused damage to the grape region, causing a potential market gap between domestic and import seasons. The Red Grape market is tightening, leading to slightly increased pricing. The Green Grape market is softening due to the Autumn King variety. Grapes are showing good quality, and the market remains steady, with larger grapes having more availability.

MARKET OUTLOOK



MARKET ALERT

Herbs



SUPPLY
FAIR

QUALITY
FAIR

The quality of herbs has improved with better weather, but domestic and imported **Chervil** production remains low due to weather and pest issues, resulting in inconsistent supply and day-to-day availability.

Cilantro: **ALERT** Supplies are slightly better with fair quality. Market pricing has improved. Supplies are shipping out of Salinas and Santa Maria. Growers are expecting supplies and markets to improve in the next few weeks. (F.O.B. pricing for this week \$18.00 - \$20.00)

Honeydews



SUPPLY
GOOD

QUALITY
GOOD

Honeydew supplies were short last week but have started to increase in Yuma and Nogales. Markets are strong on all sizes, with most availability in Yuma falling to 4s and 5s. External quality is good, with internal quality providing brix levels in the 10-13% range.

Iceberg



SUPPLY
GOOD

QUALITY
GOOD

Supplies and quality have both improved. Weights are expected to be average; lettuce heads are expected to improve. Yields are much better. Some growers are starting to harvest in Huron next week. (F.O.B. pricing for this week \$11.00 - \$12.00)

Kale



SUPPLY
GOOD

QUALITY
GOOD

Supplies are steady with good quality and demand. Supplies should remain steady for a few weeks. Market pricing is steady. (F.O.B. pricing for this week \$11.65 - \$13.65)

Leaf



SUPPLY
GOOD

QUALITY
GOOD




Green & Red Leaf: Supplies are light. Fair quality with irregular sizing, light fringe burn, and some seeder. Markets are expected to remain steady, but growers will face challenges with quality in the coming weeks. (Green Leaf F.O.B. pricing for this week \$11.00 - \$12.00)(Red Leaf F.O.B. pricing for this week \$11.00 - \$12.00)

Romaine: Supplies continue to be good with good quality. Due to irregular weather, growers are experiencing some quality issues. Carton weights are fair. Expect market pricing to remain steady for the next few weeks along with supplies. (Romaine F.O.B. pricing for this week \$12.00 - \$13.00)(Hearts F.O.B. pricing for this week \$15.00 - \$17.00)

Tender Leaf: Supplies are good with good demand. Quality is good to fair. Supplies and availability are improving due to better weather. Steady market pricing and supplies are to be expected in the next few weeks. (F.O.B. pricing for this week \$4.75 - \$5.00)

MARKET OUTLOOK



<p>MARKET ALERT</p> <p>Mushrooms</p> 	<p>SUPPLY GOOD</p> <p>QUALITY GOOD</p> <p>Mushroom supplies are expected to be limited for the next few weeks going into the holidays due to quality issues with raw ingredients in compost. Markets are expected to react to these limited supplies, leading to an escalated price.</p>
<p>Onions</p> 	<p>SUPPLY GOOD</p> <p>QUALITY GOOD</p> <p>Quality is good to excellent with steady demand. The market is slightly trending down. All colors and sizes are shipping out of the Northwest. Utah is starting. The majority of the growers are done harvesting and onions are in storage. This will also have an impact on pre-cut.</p>
<p>Onions Green</p> 	<p>SUPPLY FAIR</p> <p>QUALITY FAIR</p> <p>Supplies are slightly better. Supplies are finally improving from previous hurricane crop damage, and summer heat wave the growing area received. Current supplies are coming from Mexico. Markets will not be escalated this week. Expect fair quality. Supplies and quality will improve in the next few weeks. (F.O.B. pricing for this week \$11.00 - \$12.00)</p>
<p>Pears</p> 	<p>SUPPLY GOOD</p> <p>QUALITY GOOD</p> <p>The Pear crop is expected to be of excellent quality, like the Apple Crop. Bartlett Crop is projected to have the same amount as last season, while Bosc is expected to have a larger crop, making prices on 100s and smaller better. Red Pears are expected to peak on 80/90ct, while Anjou's in the Pacific Northwest is down by 20%. Overall, the quality is good with size a profile 80/90/100ct.</p>
<p>Peppers Bell</p> 	<p>SUPPLY FAIR</p> <p>QUALITY GOOD</p> <p>Prices for Green Bell Peppers are trending. Prices for Red and Yellow Bell Peppers are trending down. Production for Green Bell Peppers out of the East is working its way South. Production out of GA is currently feeling the impact of hurricanes earlier this year. Many local programs in the Northeast are ending. Production out West is coming out of California and Washington State. Production out of the California Desert is running 2 to 3 weeks behind this year.</p>
<p>MARKET ALERT</p> <p>Peppers Chili</p> 	<p>SUPPLY POOR</p> <p>QUALITY POOR</p> <p>Prices for Chili Peppers are mixed but remain elevated. Chili Pepper production out of the East is working its way down to the South. Many local programs in the Northeast are ending. Production out of the West is coming out of California and Mexico. Supplies are expected to remain tight going forward.</p>

MARKET OUTLOOK

Pineapples



SUPPLY

GOOD

QUALITY

GOOD

RADAR The pineapple volume is strong, with size curve starting to shift back towards larger size fruit, but it's still not consistent. Recommend being flexible with sizes since it changes week to week.

Potatoes



SUPPLY

GOOD

QUALITY

GOOD

Harvesting is wrapping up in the next week and as storages are getting full. Good quality from all growing regions. The market continues to trend down. Yields are up by 8.3% overall from the previous year. This year potato crop is in good condition. This will also affect precut.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow and Zucchini Squash are trending up. Production out of the East is coming out of Georgia. Florida is about a week away from starting. Santa Maria is winding down in the West as supplies continues to increase in Hermosillo.

Strawberries



SUPPLY

GOOD

QUALITY

GOOD

Prices for Strawberries are trending down. Production is coming out of Oxnard, Salinas, Santa Maria, and Watsonville. Growers are reporting good quality out of Oxnard. Production is forecasted to start in late November out of Florida.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

ALERT (Cherry & Grape) Prices for 20 lb Round Tomatoes, and Roma is stable. Prices for 25 lb Round & Grape Tomatoes are trending up. Cherry Tomatoes prices are trending down. The weather is cooling down in the Northeast and production is working its way South to Ruskin, FL. Production is winding down in California. Baja and Eastern Mexico are currently reporting steady light volumes.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Watermelon and minis supplies are becoming very limited as supplies are finishing up in Delaware and Indiana. California is starting to wind down while Nogales is starting. Mexico has limited supplies crossing into Southern Texas.



MARKET OUTLOOK

Produce Category Overview

The annual transition from Salinas to Arizona is expected to happen in November, which will have an impact on all Green Leaf, Iceberg Lettuce, Romaine Lettuce, Romaine Hearts, Processed Salads, and Baby Tender Leaf Items such as Spring Mix, Baby Arugula, and Baby Spinach. Once transition start, expect to see several challenges for the month of November.

Blackberries and **Blueberries (FORCE MAJEURE)** have quality challenge due to weather with **Blueberries** being declared as FORCE MAJEURE. **Brussels Sprouts** are slightly better but remain escalated. **Carrots** are short on jumbo and cello due to weather. **Chili Peppers** remain tight due to the weather. **Green Beans** supplies continues to be limited due through October. Domestic **Lemons** are tight due to heavy rains, causing delays in harvesting but are expected to improve in October. **Limes** supplies are declining in Q4 due to severe weather impacting the crops. **Mushrooms** is beginning to get tight leading into the holiday. **Navels** are delayed until the first or second week of November and there will be a gap. **Pineapples** volume are strong but sizing curve is not stable.

'Ethically sourced produce is having its moment,' says Fair Trade USA's Paul Rice

By **JENNIFER STRAILEY** | October 18, 2023

What do retailers, suppliers and industry stakeholders need to know about the newly launched Produce Program Innovation from Fair Trade USA? The Packer recently connected with Fair Trade USA founder and CEO Paul Rice via email to learn more.

The Packer: Fair Trade USA has launched its Produce Program Innovation. What do you aim to achieve with the relaunch and what updates have been made to the program?

Paul Rice: The innovations being made to the program aim to scale the impact of fair trade certification for global farmworkers and their communities by providing an industrywide, simplified fee and premium structure, and creating a transparent, equitable program that provides growth for all certificate holders.

What are some key highlights of the Fair Trade Produce Program Innovation, and how does it benefit farmers, farmworkers, the environment, retailers and consumers?

There are numerous benefits to all stakeholders in participating in the Fair Trade Produce Program:

- For farmworkers, the program creates opportunities to identify areas of need for the workforce and direct tools and resources to invest in projects to solve for those needs via the Fair Trade Premium.
- For farms and farm management, the program creates a more engaged and motivated workforce. Fair Trade standards require safe working conditions, sustainable income and more — all of which increases retention, satisfaction and productivity.
- Retailers benefit from more sustainable and resilient supply chains and from having the ability to meet the expectations of the consistently increasing "conscious consumer," which research shows is increasing across nearly all consumer demographics and heavily among millennial and Gen Z shoppers.
- Consumers are given the opportunity to access socially responsible, quality products in the produce aisle that improve workers' lives with every purchase.

Our Agricultural Production Standard minimizes environmental impacts on natural ecosystems and improves the resiliency of crop production while prohibiting practices like deforestation; limiting pesticide and fertilizer use; and encouraging improvements in the areas of biodiversity, ecosystem health and...

[Read full article HERE](#)

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. Have a great week!

Your Dedicated NPC Powered by Foodbuy Staff



Powered by Foodbuy