

# Market **OUTLOOK**

Week 6: February 5 - 11, 2024



Market **ALERT**

- Asparagus
- Berries: Raspberries & Strawberries
- Carrots
- Corn
- Grapes
- Green Beans (*Extreme*)
- Green Onions
- Herbs: Basil & Chervil
- Onions White (*Extreme*)
- Oranges
- Mushrooms
- Squashes: Yellow & Zucchini
- Tomatoes

## transportation

Nat'l Diesel Avg: \$3.867 **↑**

Last Year: \$3.112 **↓**

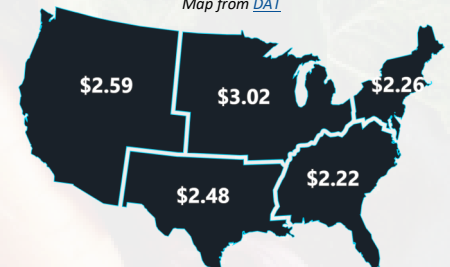
Nat'l Fuel Surcharge: \$0.48

Shortages: Freight rates is flat

- **extreme** - none
- **slight** - AZ, CA, FL, ID, OR & WA

### National Posted Rate per mile

previous week's average outbound reefer rate for each region  
Map from [DAT](#)



## weather **OUTLOOK**

**Oxnard, CA:** Partly cloudy, shower, and rain with highs in the 60s and lows in the 40s.

**Salinas, CA:** Partly cloudy and rain with highs in the 50s and lows in the 40s.

**Yuma, AZ:** Partly cloudy and sunny skies with highs in the 60s and lows in the low 40s with showers on Tuesday.

**Immokalee, FL:** Cloudy and sunny skies with highs in the 70s and lows in the 50s with thunderstorms on Monday.

**Idaho Falls, ID:** Rain, cloudy, and snow showers with highs in the 30s and lows in the 20s.



# Market UPDATE

## apples



The Washington State crop is showing good quality and supplies through Q1, with most varieties up in volume due to a small crop except for Galas. Peak sizes are trending toward foodservice sizes (125/138s) except Red Delicious, with lower volumes on 125s and smaller.

## asparagus



Mexico supply is improving, with large, XL, and Jumbo sizes expected to normalize in another week, while standard is back to normal, and Peru season is wrapping up.

## avocados



The California Avocado Commission predicts a pre-season crop of 208 million lbs, 24 million lbs shy of last year's 232 million lbs. Fruit will trickle in January/February, with 2.5 million lbs per week in March. Volume increases in May, peaking in June, and declines in August, ending in early September. These are only projections, and they will be heavily influenced by what happens in Mexico, supply and demand, and so on.

## bananas



The disruptions in Guatemala are more under control and allowing trucks to pass, resulting in an improved supply chain and a return to its pace. There are no major issues at this time.

## beans



**Green Beans:** **EXTREME** Markets are elevated with limited supplies in Florida and Mexico. Florida continues to be impacted by the cold and wet weather. This has affected plant growth and supplies. Orders are being prorated.

**Snow peas:** Supplies and quality are good.

## berries



**Blackberries:** Prices are down with steady volume and good quality from Mexico.

**Blueberries:** Prices are down, with heavy rains forecasted for most of California, impacting the market. Production is increasing in Oxnard and Mexico with good quality, while Chile's production is impacted by cool weather.

**Raspberries:** **ALERT** Prices are up, with steady volume and good quality from Mexico.

**Strawberries:** **ALERT** Prices are down, with heavy rains forecast for most of California, affecting markets and quality in Oxnard and Santa Maria. Florida is impacted by cool weather, and Mexico's production has increased with good quality.

## broccoli



**Broccoli:** Supplies are better with good demands from Santa Maria, Yuma, and Mexico. Expect supply and market pricing to be steady for the next few weeks.

**Brocolini:** Supply is steady, with increased demand and improved quality. Markets are expected to improve with better supply availability in the coming weeks.

## brussels sprouts



The supply situation is improving, with fair quality and good demand. Market pricing is improving, despite some quality issues caused by freezing temperatures.

## cabbages



The market is more active due to the transition, with steady supplies and good quality from Oxnard and Yuma.



# Market UPDATE

## carrots



The growing region in Mexico is facing water and germination issues, causing crop losses and complicating the domestic market. California and other regions are also facing weather-related challenges, with a low supply of jumbos and cellos. Prorates may be expected, and table carrots may be a substitute. Tropical storm Hilary disrupted plantings, causing reduced yields. Hurricane Idalia's devastation in Georgia may impact January volume.

## cauliflower



Supplies are better with good demands from Santa Maria, Yuma, and Mexico. Supply and market pricing are expected to be steady for the next few weeks.

## celery



Supplies and market pricing from Oxnard and Santa Maria have improved, with fair quality. With Yuma and Mexico in production, supply and market pricing are expected to improve in the next few weeks.

## citrus



**Limes:** Regardless of availability, growers are hesitant to cut fruit in order to secure the best price. Rain has provided an advantage for fruit growth, with many big fruits finishing. The quality of small fruit has not been the best due to the rain and cold weather. More oil spots will appear due to the rain. The market has been steady, with a high market for a few months.

**Lemons:** Production is strong in all sizes, with a smaller percentage of choice over fancy. Increase volumes in the coming weeks.

**Oranges: ALERT** In 2023, the California citrus region faced intense weather conditions, including excessive rain and sun, which led to a decline in small orange sizes. As the crop continues to develop, small sizes will become limited, and the remaining season and the upcoming Valencia season will be challenging. It is recommended to open specs or switch to Mandarins.

## corn



Rain and cool weather have impacted Florida and Mexico production, leading to increased prices. Quality is typically fair this time of year, and the sizes are smaller than in the summer.

## cucumbers



Prices are down on slicing cucumbers, with Honduras production covering the east. Less acreage was planted this year, while production from Mexico is increasing daily to cover the west.

## grapes



Imports are not arriving smoothly, disrupting the supply and impacting the market for a few weeks. Chilean supply may provide relief, but overall quality remains good.

## herbs



**Basil: RADAR** Rain continues to have an impact on supply and quality.

**Chervil: RADAR** Weather in Ecuador has delayed production.

**Cilantro:** Supplies are light, with fair quality and improved market pricing from Oxnard and Santa Maria. Quality and supplies are impacted due to rain earlier in the week.



# Market UPDATE

## kale



Supply is steady, demand is good, and quality is good, with an expected steady supply for the next few weeks.

## lettuce



**Green & Red Leaf:** Supplies are steady, but quality is only fair with fringe burn and epidermal peel caused by early morning frosts and freezing temperatures. Steady supplies for the next few weeks.

**Iceberg:** The supply and market pricing are steady, but the quality is fair, with lighter weights, smaller heads, and epidermal peel caused by freezing temperatures. Steady supplies and market pricing are expected for a few weeks.

**Romaine:** Supply is steady with fair quality, but early morning frost and freezing temperatures are causing quality issues like fringe burn, blistering, and early epidermal peel. Market pricing is expected to be steady for the next few weeks.

**Tender Leaf:** Supply is light, with good demand and fair quality. Colder weather will lead to lighter supplies. Steady market pricing is expected in the next few weeks. The transition to Yuma hasn't affected supplies. Early morning frost impacts are expected to affect pricing.

## melons



**Cantaloupe:** Honduran production has increased, leading to market settling. Supply will back off by the end of this week, with a lighter supply expected for three weeks before Guatemalan production starts in late February. Cooler weather has resulted in smaller sizing profiles, causing larger market movement. The quality is solid, with good external characteristics and brix levels in the 12-15% range.

**Honeydew:** Production from Honduras has been primarily larger, leaving 6/8s limited. However, the spread of sizing from Guatemalan farms has improved. Mexican crossings, especially on smaller dews, have increased, causing the market to drop from its highs. Quality has been excellent this season, with brix levels mostly in the 12-14% range.

**Watermelons:** The market remain strong with high demand. Seedless supplies are good through March, with excellent quality out of Florida. Offshore has started with limited volume.

## mushrooms



Supplies are light, primarily from Mexico, and markets are escalating due to rain and freezing temperatures. It is expected that supplies and market pricing will continue to improve.

## onions



**EXTREME (White)** The quality is good in all growing regions, with steady demand. The market prices are escalated, especially on whites. Whites are extremely tight to non-existence, followed by medium red and yellow. Some growers are done with whites for the season and will not have them available again until late April. Recent ice storms and weather in the growing region have caused loading and production delays. Imports aren't due to start until March. This will impact the precut.

## onions green



Supplies are light, primarily from Mexico, and markets are escalating due to rain and freezing temperatures. It is expected that supplies and market pricing will continue to improve.



# Market UPDATE

## pears



Bartlett quality has been marginal, with better quality expected in the next two months. Anjou quality is good, with supplies through July. Bosc quality is good, with size peaking at 120/135ct.

## peppers bell



Prices are decreasing due to weather-related impacts on Florida and Mexico production, tightening the East Coast market, while increased volume from Mexico is helping reduce prices.

## peppers chili



Prices are decreasing due to increased production and soft demand, with all prices being normal for this time of year.

## pineapples



Sugar content remained above 15 brix and firmness improved slightly. No vessel delays were reported, but loading delays are expected. Weather patterns remained consistent, with a slight decrease in precipitation and overcast days potentially causing new natural flowering events.

## potatoes



The market is flat, with good quality. Idaho has plenty of availability due to better yields, making it a good time to promote potatoes.

## squash



Yellow and zucchini squash prices are stable with fair to poor quality due to rain and cool weather in South Florida and Mexico, with supplies expected to increase in the coming weeks.

## tomatoes



Prices have decreased, except for 25 lb round, grape and cherry tomatoes which are still high. Improved weather in Florida and Mexico is boosting production, and growers predict continued price decreases.

## commodities alert overview

Farming operations have been impacted by the cold weather in Florida and Mexico. **Asparagus** is beginning to improve. **Strawberries** are up due to heavy rain in California. **Carrots** are short on jumbo and cello due to the weather and are expected to be short through February. **Green beans** are limited and have escalated due to the weather affecting the growing regions. **Onions** are escalated, with whites being extremely limited to non-existence, with no relief until Mexico starts. **Tomato** market pricing is starting to decrease.



# Market UPDATE

## in the news...

### CAC forecasts smaller California avocado crop this year

By **THE PACKER STAFF** January 29, 2024 | THE PACKER

The official crop forecast for the California Avocado Commission’s fiscal year 2023-24 is 208 million pounds, compared to the prior year volume of 237 million pounds, according to a news release.

Weather and market conditions will be key factors when California avocado growers begin harvesting. The potential for a wet winter may encourage some growers to delay picking to allow their avocados time to increase in size, which could in turn increase the crop volume, the commission says.

“The California Avocado Commission, customers and avocado lovers are eagerly anticipating locally and ethically grown California avocados in

stores, on menus and on plates,” CAC Vice President of Marketing Terry Splane said in the release. “Some very early season harvesting has occurred already and we’re anticipating the volume to ramp up in March and April.”

California Avocado Commission’s marketing team gathers in an avocado grove. (Photo courtesy of California Avocado Commission)

The majority, or 196 million pounds, of the premium California avocado harvest will be the hass variety, the release said. The lamb hass variety is expected to contribute 6 million pounds, GEM 5 million pounds and another 1 million pounds will come from other varieties commercially



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grown in California.

#### NEW CONSUMER CAMPAIGN

The commission says it supports all California avocado varieties, and in concert with its new agency...

[Read full article HERE](#)

*produce in* **PEAK** *for February*

|                  |         |          |
|------------------|---------|----------|
| Apples           | Cabbage | Oranges  |
| Avocado          | Kale    | Parsnip  |
| Brussels Sprouts | Kiwi    | Potatoes |

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to [jhoppe@nproduce.com](mailto:jhoppe@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