

Market **OUTLOOK**

Week 13: March 25 - 31, 2024



Market ALERT

- Bell Peppers: Red & Yellow
- Broccoli
- Cucumbers
- Herbs
- Lettuce
- Onions
- Oranges
- Raspberries
- Tomato Cherry

transportation

Nat'l Diesel Avg: \$4.028↑

Last Year: \$3.871↓

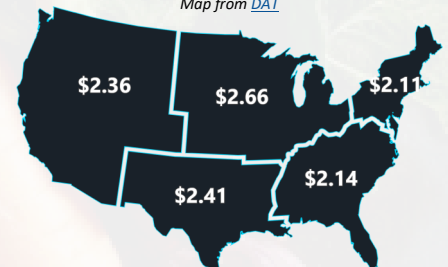
Nat'l Fuel Surcharge: \$0.50

Shortages: Freight rates is flat

- extreme - none
- slight - none

National Posted Rate per mile

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



weather **OUTLOOK**

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

Salinas, CA: Partly cloudy and showers with highs in the 60s and lows in the 40s.

Yuma, AZ: Partly cloudy and sunny skies with highs in the mid-70s to 80s and lows in the low 50s.

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

Idaho Falls, ID: Mostly cloudy and PM showers with highs in the 40s and lows in the 30s with snow to rain on Thursday.



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



The market is stable and preparing for Easter, with good quality. Weather has impacted production in Mexico, causing a slight market price increase. Supplies are expected to remain stable through April. Peru will start in May. It's a good time to promote.

avocados



RADAR The industry is working to be fully stocked for Holy Week, with new harvested volumes expected to drop 33% next week. However, the pipeline has been filling up, and no disruptions are expected. USDA pricing is up, but actual sales are lagging at the border. The USDA reports limited 60s and smaller fruits are selling for more. The real market price is expected to catch up next week. The size curve favors larger fruit, expected to continue into early April. The normal crop is maturing, with dry matter averaging 34%, shorter ripe cycles, and a peak eating experience. The temperature recommendations are 38° for storage and 37° for transit.

bananas



Vessels are on schedule for ports in PA, FL, and TX, with CA experiencing a delay but no major issues. Fruit quality is good, and strong inventories are expected in the coming weeks. Some rare cases may result in color stage delays.

beans



Green Beans: Prices have returned to normal with steady demand, and supplies have improved, making it an ideal time to promote.

Snow Peas: Guatemalan production is improving, while supplies are steady out of Mexico.

berries



Blackberries: Prices are down with steady production and with fair quality from Mexico.

Blueberries: Prices are up and of good quality. Chile is about done for the season, while Florida and Georgia production are increasing and Mexico remains steady.

Raspberries: **ALERT** Prices are stable but remain elevated with tight supplies from Mexico and good quality.

Strawberries: Prices are up, with Oxnard and Santa Maria reporting good quality and increased volumes, while Florida volumes are decreasing and Mexico is done for the season.

broccoli



Broccoli: Supply is steady; both demand and quality are good, with supplies coming from Yuma, Santa Maria, Salinas, and Mexico. Market pricing will increase as supplies are expected to be light in the next few weeks as Yuma wraps up.

Broccolini: **ALERT** Supplies are limited with good demands, and quality is only fair due to previous rain in California and Mexico, causing harvest delays. Supplies are expected to improve in the next few weeks when they transition to Salinas, and market pricing is expected to remain escalated due to limited supplies.



Market UPDATE

brussels sprouts



The supply is better, with fair quality and good demand, despite quality challenges due to previous freezing temperatures. Market prices continue to improve with steady supply.

cabbages



The market and supplies are expected to remain steady in the next few weeks, with good quality from Oxnard and Yuma.

carrots



New crops are on the horizon, with improved supply and quality going forward.

cauliflower



Supply is light and demand is good, with supplies coming from Yuma, Santa Maria, Mexico, and some in Salinas. As Yuma winds down, supply is expected to be light, and market prices will rise.

celery



Supply is steady with good quality and improved market pricing from Santa Maria, Oxnard, Yuma, and Mexico.

citrus



Limes: Expect tight volume due to religious holidays in Mexico, with the market likely to react accordingly. There will be no harvesting from March 27th to April 1st. After these two weeks, plenty of volume should start crossing, and warm weather should be favorable for maturity and prevent a shortage like previous years, as long as no major events occur.

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 apples.

corn



Prices are down with improved supplies and quality out of Florida and Mexico.

cucumbers



Prices are down, but remain elevated due to market volatility in the East, with production shifting to Florida from Honduras and Mexico transiting from Sinaloa to Sonora.

grapes



RADAR Supplies are tight, but volumes are improving on both the east and west coasts. Recommend subs with black grapes for reds until market improvement, and expect weekly improvements.

herbs



ALERT (Basil, Chervil, Dill, & Oregano) Rain in the growing region continues to affect supply and quality.

Cilantro: Supplies and quality are good, with improved market pricing from Oxnard and Yuma. Supplies are expected to remain steady.



Market UPDATE

kale



Supply is steady with good demand and quality. Supplies and market prices are expected to be steady for the next few weeks.

lettuce



Green & Red Leaf: ALERT Supplies are light, but fair quality is reported due to fringe burn and mildew, primarily caused by previous rains and freezing temperatures, causing cosmetic issues and lower yields. The market price is expected to increase in the next few weeks.

Iceberg: EXTREME Supplies continue to be light and of fair quality, with lighter weights and smaller heads. Past freezing temperatures and rains have caused some cosmetic issues, larger cores, and mildew. Supply is expected to be limited in the next three weeks, and markets have increased due to lower yields. Huron is expected to start, which will help improve supplies. Expect increased prices in the next three weeks.

Romaine: EXTREME Supplies are light and of fair quality, but early morning frost and freezing temperatures are causing quality issues like fringe burn, blistering, and mildew. Growers experienced labor delays and cosmetic issues, leading to light supplies and increased market pricing in the next three weeks, affecting the quality of packed products.

Tender Leaf: Supply is steady, with good demand and good to fair quality due to previous rains and freezing temperatures. The supply is expected to improve with steady market pricing.

melons



Cantaloupe: The market has been stagnant due to lower demand, but there is an expectation of increased demand as Easter approaches and

retail promotions are in place post-holiday. Increased pulls on larger sizes are expected to push the market slightly higher during peak volume periods. The recent sizing has primarily been 9ct, with high-color fruit and brix levels in the 12-15% range.

Honeydew: Due to limited supplies crossing through Nogales, western demand has shifted to the east. Currently, sizing is primarily 5/5Js from Guatemala and Honduras production, but there is a slight shift with more 6s arrivals. Quality is excellent, especially in second-cycle production from Guatemala.

Watermelons: Due to virus-related issues in Honduras and reduced Mexico supply, seedless will end next week with limited supply.

mushrooms



The weather has improved the quality and supply of brown and white, indicating a steady supply for the next few months. It's a good time to promote.

onions



ALERT (White) The quality is good in all growing regions, with steady demand. Market prices are steady on yellow, with red slightly up and white prices slightly down but remaining escalated. The availability of white onions is limited, followed by medium red and jumbo yellow. Washington is about done, and imports are starting to slowly increase with decent quality. Europe is offering cash to Mexican growers and buying up all the jumbo white onions, causing supplies in North America to be extremely tight. Vidalias is expected to start on April 17th. Imperial Valley is expected to start in the last week of April, while New Mexico is expected to start at the beginning of June. This will impact the precut.



Market UPDATE

onions green



Supplies have improved, coming from Mexico. Markets are recovering from past freezing temperatures and rains in Mexico. Supplies are expected to continue to improve.

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



Green bell prices are down, while red and yellow bell prices remain stable but high. Florida growers expect supply to increase in the coming weeks, while Mexico supplies remain steady.

peppers chili



Prices are mixed with an upward bias, with production from Florida expected to be tight for the next few weeks, and Mexico is experiencing tight conditions with crops transiting from Sinaloa to Sonora.

pineapples



As Easter approaches, harvest in the tropics will halt for a few days, leading to tighter volumes. Expect improved volumes by mid-April.

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



Zucchini and yellow squash prices are down, with Florida production increasing with some quality issues, while Mexico production remains steady.

tomatoes



ALERT (Cherry) Prices are mixed, with 20 lb rounds and roma increasing, while grape and cherry are down. Production is picking up in Florida, and Mexico's winter/spring crop is expected to run until late May or early June. Supplies are expected to increase in Florida going forward.

commodities alert overview

The produce industry continues to experience quality and yield issues due to weather that caused crop failures, poor product quality, and impacted availability. The annual transition from Arizona's growing season to California has started, which will have an impact quality and availability on all lettuces, greens, broccoli, cauliflowers, and cabbages. **Raspberries** prices are escalated due to the cooler weather and low supplies. **Onions White** remain limited and elevated with no relief until mid-to-end of April, with the recommendation of substituting yellow where applicable. **Oranges** will be limited to smaller sizes due to the weather in California; it is recommended to open spec or switch to apples. **Tomato Cherry** are improving, and prices are starting to drop. It's a good time to promote **Asparagus, Green Beans, Mushrooms and Potatoes.**



Market UPDATE

in the news...

EFI celebrates National Farmworker Awareness Week

By **THE PACKER STAFF** | March 20, 2024 | THE PACKER

Equitable Food Initiative has released an updated communications toolkit in preparation for Farmworker Awareness Week, held March 25-31 annually.

EFI is the capacity-building and certification organization that partners with growers, farmworkers, retailers and consumer groups.

In the spirit of the weeklong celebration of the hands that put food on consumers' tables, EFI said it encourages those in the agricultural supply chain, government entities and consumers to stand in support and appreciation of farmworkers.

The revamped communications toolkit is designed to amplify the voices and stories of farmworkers across the Americas while offering an array of resources for anyone dedicated to highlighting the contributions of farmworkers every day, according to a news release.

The toolkit has been expanded to

include even more comprehensive features, including:

- Educational resources and activities for students.
- Statistics-forward infographics.
- Sample logos, images and posters for social media and around the office.
- Example proclamations, press release templates and more.

The Farmworker Awareness Week communications toolkit and all associated resources are available for free download at equitablefood.org/toolkit.

EFI said it encourages individuals and organizations working in agriculture to use the toolkit and highlight the important work performed by the millions of workers on farms and ranches who help add \$165 billion each year to the gross domestic product.

"We are excited to share the newest

updates to our toolkit," LeAnne Ruzzamenti, EFI's director of marketing communications, said in the release. "Farmworkers are an indispensable asset, and we want them to know we appreciate their efforts. EFI also wants to educate our communities and government on the importance of farmworkers and the need to invest in developing and recognizing their skills."

By leveraging the power of storytelling and media outreach, the industry can collectively work towards building greater awareness of the work and individuals behind the food supply, the release said.

"With this toolkit, anyone can show their appreciation for the skilled and difficult work performed by farmworkers," Ruzzamenti said. "It also gives the industry an opportunity to educate consumers about the 365 days of care required to keep fresh..."

[Read full article HERE](#)

produce in **PEAK** *for March*

Asparagus	Cabbage	Pears
Avocado	Carrots	Potatoes
Broccoli	Kiwi	Turnips



Market UPDATE

Transition Schedules - Spring - Salinas Season - 2024

Grower / Shipper	Current Location	Transitioning	Commodity	Transition Dates	Transition Dates	Region
Bengard Ranches	Yuma, AZ	Salinas, CA	Broccoli Crowns	03/05/24		
Bengard Ranches	Yuma, AZ	Salinas, CA	Cauliflower	03/05/24		
Bengard Ranches	Yuma, AZ	Huron, CA	Lettuce Iceberg	03/18/24	04/15/24	Salinas CA
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/01/24		
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/01/24		
Bengard Ranches	Yuma, AZ	Oxnard, CA	Celery	06/15/24	03/30/24	Oxnard
Church Brothers	Yuma, AZ	Salinas, CA	Broccoli Crowns	03/15/24		
Church Brothers	Yuma, AZ	Salinas, CA	Cauliflower	03/15/24		
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Iceberg	04/15/24		
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/01/24		
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/22/24		
Church Brothers	Yuma, AZ	Salinas, CA	Celery	03/18/24	06/03/24	Salinas CA
Church Brothers	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/15/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Broccoli Crowns	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Cauliflower	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Iceberg	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Green Leaf / Red Leaf	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Romaine	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Value Added / Processing Plant	03/25/24		
Green Gate Fresh	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/22/24		
River Fresh Farms	Yuma, AZ	Salinas, CA	Broccoli Crowns	03/20/24		
River Fresh Farms	Yuma, AZ	Salinas, CA	Cauliflower	03/20/24		
River Fresh Farms	Yuma, AZ	Huron, CA	Lettuce Iceberg	03/18/24	04/15/24	Salinas CA
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/01/24		
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/01/24		
River Fresh Farms	Yuma, AZ	Salinas, CA	Celery	06/15/24		
Taylor Farms - CA	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/15/24	Updated	
The Salad Farm	Yuma, AZ	Hollister, CA	Value Added / Processing Plant	04/01/24		

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 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

