



WEEK 17: April 24 - April 30, 2023
MARKET OUTLOOK

Transportation:

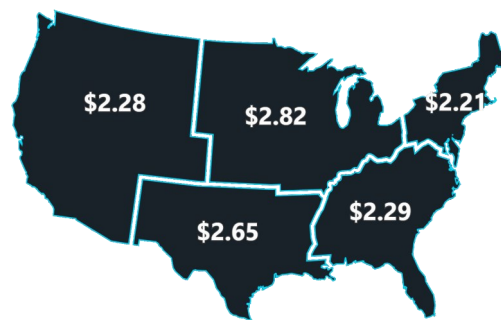
National Diesel Average: \$4.116

Compared to Last Year: \$3.131

National Fuel Surcharge: \$0.55

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

National Posted Rate per mile
previous week's average outbound reefer rate for each region
 Map from [DAT](#)



Regional Weather Update:

Oxnard, CA: Partly cloudy skies with highs in the 60s and lows in the 50s.

Salinas, CA: Sunny and cloudy skies with highs in the 60s and lows in the upper 40s.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 90s and 90s and lows in the 60s.

Immokalee, FL: Thunderstorms, cloudy and showers throughout the week with highs in the 90s and lows in the 60s.

Idaho Falls, ID: Cloudy, showers, snow showers, and sunny skies throughout the week with highs in the 50s to 60s and lows in the 30s.

MARKET ALERT

- Anaheim Peppers
- Arugula Baby
- Berries: Blackberries, Blueberries, Raspberries & Strawberries
- Broccoli
- Broccolini (Extreme)
- Brussels Sprouts
- Carrots (Radar)
- Cauliflowers (Extreme)
- Green Beans
- Herbs: Chervil, Cilantro
- Lettuces: Iceberg (Extreme), Green & Red Leaf, Romaine & Tender Leaf
- Mushrooms
- Pepper Bells: Green, Red & Yellow
- Pineapples (Radar)

MARKET OUTLOOK



Apples



SUPPLY

FAIR

QUALITY

GOOD

According to a January report from USApple, apple holdings are down 4.1% from previous time period. Total volume of bushes reported on January 1 was 84.2 Mil, which is 12.5% less than the January 5-year average. Report showed Washington continue to produce the most, with 91.9 Mil bushels (42 lbs) during 2022–23 follow by Michigan with 9.9 Mil bushels. Washington production has dropped by 7.3 Mil bushels year-on-year. The production this year is 17.1 Mil bushels lower than the January 5-year average. Gala had the largest production at 21.1 Mil bushels, followed by Red Delicious with 15.8 Mil and Fuji at 12.8 Mil bushels. Per the USDA's projection, follow by back to back years of volume decreased, the U.S. is projected to increase production by 158,000 tons to 4.5 Mil in 2022-23. Despite higher supplies, exports are expected to fall 53,000 to 670,000 tons, marking the third consecutive year of decline on reduced Washington output. With higher shipments from New Zealand, imports are anticipated to increase by 10,000 to 115,000 tons.

MARKET ALERT

Arugula



SUPPLY

FAIR

QUALITY

FAIR

ALERT (Baby) Supplies are light. Quality is fair. Market pricing is steady. Growers are transitioning back to Salinas. Supplies are limited due the recent floods in Salinas. Growers are expecting limited supplies for the next few weeks. (F.O.B pricing for this week \$8.50-\$9.45)

Asparagus



SUPPLY

GOOD

QUALITY

GOOD

Mexico production is finishing up with limited availability. Some fields are closing due to seasonality and lack of labor. Due to the heat, some regions are seeing heavy seeding and spreading. Peru continues to be light due to weather. Markets remains active and elevated. XLg and jumbo are holding steady while there's a slight decrease on standard and large.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

Fruit shows nice oil content. It is critical to maintain a cold chain and store at 38°F. The crop's maturity has produced large sizes, which reflects market pricing. California harvest is in full swing, with weekly amounts projected to increase. Mexico and California, on the other hand, are more likely to accommodate the growing market share. The California harvest is at its peak, which is expected to continue through June. Peru expects the number of exports to the US to increase this season, and the season to run later into the fall.

Bananas



SUPPLY

GOOD

QUALITY

GOOD

Bananas are currently solid and consistent.

MARKET OUTLOOK



MARKET ALERT

Beans



SUPPLY
LIMITED
QUALITY
FAIR

Green Beans: **ALERT** Beans are in the middle of a transition from South Florida to Central and Northern Florida growing region. Production in Florida has been impacted by the recent rain and flood. Some shippers are prorating 40-50% for the next 5-6 days. Mexico is having a challenge in transition due to weather. Market is elevated due to the weather and lack of supplies from both Mexico and Florida. Expecting to remain elevated for a couple of weeks.

Snow Peas: Supplies and market are steady. Some quality issues have been reported.

MARKET ALERT

Berries



SUPPLY
FAIR
QUALITY
FAIR

Blackberries: Prices for Blackberries are trending up with fair quality. Availability remains limited. Production out of Mexico is approaching their seasonal low. California is forecasted to come online during the second week of June. Production out of the Southeast is expected to start in 2 to 3 weeks.

Blueberries: Prices for Blueberries are trending slightly down. Prices remain elevated. Production is picking up out of Florida. Georgia's production will start soon. Production out of Mexico is coming off their peak and volume is expected to come down weekly.

Raspberries: Prices for Raspberries are trending up. Production out of Mexico is approaching their seasonal low. California is forecasted to come online during the second week of June. Availability remains limited. Quality has been impacted by the high temp.

MARKET ALERT

Broccoli



SUPPLY
LIMITED
QUALITY
FAIR

Broccoli: **ALERT** Supplies will be very limited. Demand continues to be strong. Market pricing continues to escalate. Supplies coming from Salinas, Santa Maria, and Mexico. For the next few weeks, supplies are expected to be limited during the transition from Yuma to Salinas. (F.O.B pricing for this week \$49.00 - \$50.00)

Broccolini: **EXTREME** Supplies continue to be very limited. Demand exceeds supplies. Growers continue to pro-rate orders. Market is expected to remain unstable for another couple of weeks due to the transition back to Salinas. (F.O.B. pricing for this week \$22.75 - \$25.55)

MARKET ALERT

Brussels Sprouts



SUPPLY
FAIR
QUALITY
FAIR

Supplies are light. Quality is good. Demand continues to be steady. Volume from Mexico is winding down as growers are transitioning to Salinas. Market pricing is expected to escalate in the next few weeks. (F.O.B pricing for this week \$32.45 - \$34.75)

Cabbages



SUPPLY
GOOD
QUALITY
GOOD

Supplies are better. Market pricing has improved. Prices are steady. Supplies are coming from Yuma and Imperial Valley. (F.O.B pricing for this week \$12.65 - \$14.45)

MARKET OUTLOOK

Cantaloupes



SUPPLY
GOOD
QUALITY
GOOD

Offshore cantaloupes are still arriving at all ports with light supplies. Cantaloupe supply is strong. Sizing has shifted to 9/12s. Demand is trending up. Quality has been good with excellent color and strong flavor profile. Transition to the desert has been delayed until the last week of May due to colder temperature. Brix is mostly in the 13-15% range.

Carrots



SUPPLY
GOOD
QUALITY
GOOD

RADAR Rains in California could make things more difficult in the carrot region. Although there has been no immediate damage, plants due to be harvested in the next 2-4 months may be affected, but it is yet too early to tell. A late summer/early fall crop is causing concern. The rain has delayed harvesting, and if it continues, the supply may be jeopardized. Some crops are transitioning to the desert this weekend, which will be a crucial deciding factor in how the season goes.

MARKET ALERT

Cauliflower



SUPPLY
SHORT
QUALITY
FAIR

EXTREME Supplies continue to be extremely limited. Market pricing is escalated. Supplies are coming from Salinas, Santa Maria, and Mexico. Supplies are expected to be extremely limited due to the transition from Yuma to Salinas. Market pricing is expected to be escalated for a few weeks. (F.O.B pricing for this week \$62.65 - \$65.00)

Celery



SUPPLY
GOOD
QUALITY
GOOD

Supplies continue to be good with some fair quality. Supplies are coming from Oxnard and Yuma. Yuma is winding down, moving to Santa Maria and Oxnard region. Demand is very good. Market pricing is trending up, and supplies are decreasing. (F.O.B pricing for this week \$11.35 - \$11.65)

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: As availability increases, the market is beginning to de-escalate, more quickly on small fruit. Recent rain events have aided fruit development and color, but they may also result in conditioned flaws such as styler-end breakdown and oil spots, which can appear days after initial transport. This happens more often with large sizes. Small fruit is still peaking, accounting for 60% of total yields while large fruit will remain scarce for the foreseeable future. Expect a big price gap between small and large sizes if the market potentially descends. Peru and Columbia continue to export to capitalize on the elevated market and cover Mexico's supply gap. We will see more offshore fruit at ports of entry on the East Coast and in South Florida. Due to pricing benefits based on delivery location, demand is elevated, especially for large sizes.

Lemons: Weather has been holding up. Shippers will try to stretch current supplies to end of June. Some very late ranches in D1, but this year will end a little early. Fruit is sizing up. Rain has hurt pack-outs for many growers. Peaking on 115s. 140s Fancy are tight as this is the size/grades preferred by national retailers. Argentina will start in June.

Oranges: Navels are projecting to end mid-June. Brix is nice with an excellent color. Size is still small and will continue until the end of the Navel season. Peaking on 88s with very limited 48s/56s.

MARKET OUTLOOK



Corn



SUPPLY

GOOD

QUALITY

GOOD

Prices for Bi and Yellow Corn are trending up. Growers expect the market to settle down a bit as demands return to normal levels going forward. Corn production out of the West has transitioned to Brawley.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Slicing, English and Persian Cucumbers are trending down. Florida is experiencing rain and high temperatures. Production out of Mexico remain at good levels.

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

GOOD

QUALITY

GOOD

The number of grapes imported this season is significantly lower than last year. Most of this decline is concentrated in the final third of the year. It appears that import cases in 2023 will be around 20% lower than in 2022. The cause for this is Chile's severe heat in January and February. Growers in Mexico will have a late start, resulting in a few weeks' supply gap. Alternative fruits are advised as a substitute.

Herbs



SUPPLY

FAIR

QUALITY

FAIR

Herbs from Colombia continues to struggle due to the weather. Quality are fair. Expecting to improve in the next few weeks. **Chervil** production continues to be a challenge.

Cilantro: ALERT Supplies are light with fair quality. Market pricing has increase. Supplies are shipping out of Oxnard and Santa Maria. Supplies will be light for the next few weeks due to the transition to Santa Maria and Salinas. (F.O.B price for this week \$20.75 - \$21.45)

MARKET OUTLOOK

Honeydews



SUPPLY

FAIR

QUALITY

GOOD

Honeydew continues to be limited on smaller fruits as demand has exceeded supplies. Jumbos are available. Quality is good. Recommend being flexible on sizes. Brix is 12-14% range.

MARKET ALERT

Iceberg



SUPPLY

SHORT

QUALITY

FAIR

EXTREME Supplies continues to be very limited. Quality is fair. Weights continue to be down due to smaller heads. Growers are expecting supplies to be limited for the next few weeks as they transition back to Salinas and Huron. Some growers have finished harvesting in Yuma and have moved to Huron. Salinas is delayed due to the rain and cold temperatures. Expect escalated markets for the next few weeks. (F.O.B pricing for this week \$49.00 - \$51.00)

Kale



SUPPLY

FAIR

QUALITY

GOOD

Supplies are steady. Demand continues to be very good. Quality is good. Supplies should remain steady for a few weeks. Market pricing is steady. (F.O.B pricing for this week \$14.65 - \$16.45)

MARKET ALERT

Leaf



SUPPLY

LIMITED

QUALITY

FAIR

Green & Red Leaf: Supplies will be very limited. Quality is fair. Expect to see fringe burn and smaller heads. Market price has increased as growers are finishing up in Yuma and transitioning to Salinas. Expect escalated markets for the next few weeks. (Green Leaf F.O.B. pricing for this week \$26.50 - \$29.75)(Red Leaf F.O.B. pricing for this week \$29.65 - \$31.25)

Romaine: Supplies continue to be limited with fair quality. Expect to see fringe burn and smaller heads. Some growers are finished in Yuma and have transitioned to Salinas. Expect market pricing to be escalated for the next few weeks. Supplies will remain a challenge for the next few weeks during the transition from Yuma to Salinas. (Romaine F.O.B pricing for this week \$25.00 - \$27.00)(Hearts F.O.B pricing for this week \$29.25 - \$31.50)

Tender Leaf: Supplies are better. Demand continues to be good. Quality is fair. Market pricing is steady. Growers have finished in Yuma and have transitioned to Salinas. Some tender leaf crops have been delayed due to the recent floods and cold temperatures in Salinas. (F.O.B pricing for this week \$4.75 - \$5.50)

MARKET OUTLOOK

MARKET ALERT

Mushrooms



SUPPLY

FAIR

QUALITY

GOOD

The mushroom industry continues with a shortage of labor, as well as cost inflation increases in raw materials. Specifically corrugated cardboard and packaging materials. Expect for Mushroom pricing to remain strong.

Shitake: Shitake mushroom supplies will be short due to an uncontrollable rise in the cost of imported Shitake logs from China. Shitake mushrooms supplies will be short, prices will be changing almost weekly. Increase pricing in raw materials is also causing price increases.

Onions



SUPPLY

GOOD

QUALITY

GOOD

Onions are coming out of Idaho, Georgia, Oregon, and Texas. Demand is steady. Quality is good. Market is escalated. Imperial Valley is starting soon. Texas has slowed down due to the rain which is causing a short supply. Eagle Pass is expected to start the first week of May. All colors available. Vidalia just started. Peru is wrapping up and will finish end of April. Some growers have finished planting for next season crops in the west. This will also have an impact on precut.

Onions Green



SUPPLY

GOOD

QUALITY

GOOD

Supplies continue to be steady. Market pricing is back to normal. Supplies are coming from Mexico. Past cold temperatures slowed down the supplies. Current supplies are expected to continue improving for the next few weeks. (F.O.B pricing for this week \$9.75 - \$11.45)

MARKET ALERT

Peppers Bell



SUPPLY

GOOD

QUALITY

GOOD

Prices for Green, Red and Yellow Bell Peppers are trending down. Florida is experiencing rain and high temperatures. Planting in California is delayed due to rain.

MARKET ALERT

Peppers Chili



SUPPLY

GOOD

QUALITY

GOOD

ALERT (Anaheim) Prices for Chili Peppers are mostly trending up. Growers are reporting that the Jalapeno and Anaheim pepper market is tightening up. Growers are forecasting that central Florida will come online in a few weeks.

MARKET OUTLOOK

Pineapples



SUPPLY

FAIR

QUALITY

GOOD

RADAR The pipeline is yet to be back to normal. Supply has not increased, and fruit availability is quite limited. Pineapples are beginning to shift from larger to smaller sizes in the coming weeks.

Potatoes



SUPPLY

FAIR

QUALITY

GOOD

Packers are slightly reducing their output to start stretching their supplies to cover any potential delays in reaching the new crop. This has moved the market up slightly as demand is still good. Planting for next season has been delayed due to the cold temperatures and snow in the growing regions. This will affect the pre-cut as well.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow and Zucchini Squash are trending down. Supplies out of Florida are tightening as production transition from South to Central Florida. Mexico production is starting to increase.

MARKET ALERT

Strawberries



SUPPLY

FAIR

QUALITY

POOR

Prices for Strawberries are mostly stable. With Florida and Texas out of the picture, the pressure is on California and Baja. Quality is fair with some occasional white shoulders, inconsistent sizing, and some bruising. Packers are doing their best to have clean packs. The weather in California has improved. They will see volumes increase going forward. Growers are reporting that supplies for the Mother's Day holiday are expected to be good.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for 25 lb Round, Grape, and Roma Tomatoes are trending up. Prices for 20 lb Round and Cherry Tomatoes are stable. Tomatoes currently remain a great value. Growers out of Florida and Mexico are reporting good quality and volumes. The weather in all growing areas has been very good.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Supplies are good on large fruit, but minis remain a little tight in all areas as offshores are winding down. Small seedless watermelons are tight. The volume out East and Florida is good. Mexican melons are shipping out of Edinburg and Nogales. Out West, the volume is expected to pick up at the end of April.



MARKET OUTLOOK

Produce Category Overview

The produce industry continues to experience unprecedented 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 is in progress and supplies has been impacted on all lettuces, greens, broccoli, cauliflowers, and cabbages. Due to the recent floods in the Salinas Valley, the transition dates from Arizona to California are only tentative and are subject to change. **Tender leaf** and **Celery** growers are looking to transition the second week of April, **commodity carton** growers are looking into transition mid-April, and **processors** growers/shippers are looking to transition late April and early May. It could be delayed a week or two. **Limes** are transitioning now through April, elevated prices, lower quality, and short supplies are expected. **Grapes** and **melons** are expecting to transition in May from imports to domestic. **Baby arugula** are being prorated by some growers with fair quality. **Broccoli** will be limited. Extreme alert for **Broccolini** due to weather and will be unstable for a few weeks. Extreme alert for **Iceberg** and **Cauliflower** due to the transition; supplies will be limited. **Green Beans** are transitioning and have been impacted by weather both in Florida and Mexico.

ProduceIQ: Markets bracing for volatile transitions

April 17, 2023 - Featured, By Mark Campbell

March inflation reports are inspiring cautious optimism.

Grocery prices fell by 0.3 percent for the first time since September 2020, welcome news for price-weary consumers. However, experts are concerned that the small advance isn't enough positive momentum to significantly alter the Fed's anti-inflationary tactics.

Interestingly, our own ProduceIQ Index also fell by -1 percent. Year over year, the index is down to \$1.22 from 2022's record-breaking \$1.23.

Blue Book has teamed with ProduceIQ BB #:368175 to bring the ProduceIQ Index to its readers. The index provides a produce industry price benchmark using 40 top commodities to provide data for decision making.

ProduceIQ Index: \$1.22/pound, up +1.7 percent over prior week

Week #15, ending April 14th

In weather news, a freak thunderstorm discharged a kiddie pool's worth of water on Fort Lauderdale. A reported 25 inches soaked the city last week when an ordinary thunderstorm hooked up with a warm and wet gulf stream, a 24-hour record for the city. Sans hurricane, this impressive amount of water flooded cars and even shut down the airport unexpectedly.

Fortunately for fresh produce, there isn't much agriculture left in Broward County, though the 1-in-1000 storm is a troubling reminder that no one is ever safe from the whims of mother nature.

Overdue Western produce is intensifying Spring produce markets. At this point, this phenom event needs an official name. May we suggest "The great salad bowl shortage of 2023."

Broccoli and cauliflower markets are in an extreme demand-exceeds-supply situation. Prices are rapidly increasing. Broccoli is up +27 percent over the previous week to \$40, and cauliflower is up +39 percent. Both commodities are at a ten-year high by a significant margin.

Growers in Salinas are significantly behind schedule due to historic flooding throughout the growing region. Those looking to cover shorts can look to Mexico and Santa Maria for coverage. Unfortunately for buyers, this is the situation in which they hope the adage "the cure for high prices is high prices" proves to be true sooner....

[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 FB, LLC Staff



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