



WEEK 20: May 15 - May 21, 2023

MARKET OUTLOOK

Transportation:

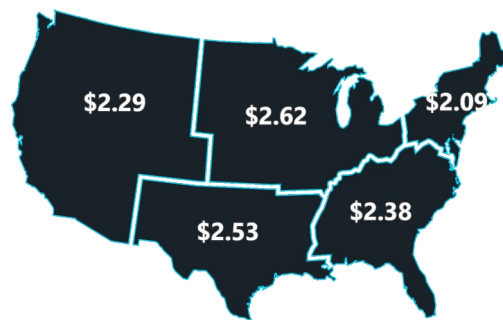
National Diesel Average: \$3.922

Compared to Last Year: \$2.221

National Fuel Surcharge: \$0.50

Shortages: Seeing high freight rates, with **extreme** shortages - None; **slight** shortages - AZ, CA & FL

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 upper 60s and lows in the 50s.

Salinas, CA: Sunny and partly cloudy skies with highs in the 70s and lows in the 50s.

Yuma, AZ: Cloudy and sunny skies with highs in the mid-to-upper 90s and lows in the 70s.

Immokalee, FL: PM showers with highs in the upper 90s and lows in the 70s.

Idaho Falls, ID: Cloudy and sunny skies with highs in the 70s and 80s and lows in the upper 40s to 50s.

MARKET ALERT

- Berries:** Blackberries, Blueberries & Raspberries
- Brussels Sprouts**
- Cauliflowers**
- Celery (Extreme)**
- Grapes (Extreme)**
- Green Beans (Radar)**
- Herbs:** Chervil & Cilantro
- Lettuces:** Green & Red Leaf, Iceberg & Romaine
- Melons (Radar):** Cantaloupe & Honeydew
- Peppers Bell**
- Pepper Chili:** Anaheim & Poblano
- 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. Gala had the largest production at 21.1 Mil bushels, followed by Red Delicious with 15.8 Mil and Fuji at 12.8 Mil. 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.

Asparagus



SUPPLY

GOOD

QUALITY

FAIR

Supplies from Mexico are light. Baja continues with light volume. Peru production remain light due to warmer weather with fair quality. California started with limited supply and Washington has started. Idaho, Michigan, and Oregon will start in a week or two. Domestic volumes is expected to be available in all growing region by the end of May. Quality has been excellent Market is active and strong on all sizes.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

Mexico accounts for 78% of avocados in the US market, while California is at 21% and Peru is less than 1%. With a healthy inventory on the trees in the higher elevations that harvesting crews have moved into, the recent significant harvest volumes from Mexico have brought the current season into line with years previous. Dry matter is currently between 33% and 35%, which gives the fruit a peak flavor profile and less time to ripen. It is critical to maintain a cold chain and store at 38°F for the longest possible shelf life. Higher altitudes will also provide an abundance of avocados in grade 2 and larger sizes. Previously, the start of the Flora Loca/Summer crops was determined by date, within the first week of July, but this season the Summer Crops in Michoacan and Jalisco can be harvested once the fruit meets a dry matter of 23%, so the harvest of Loca could begin as early as the first week of June, depending on the dry matter. Summer crops, which are harvested at lower elevations, typically have a size curve dominated by 60s and smaller, while the harvest of late season fruit at higher elevations will produce large sizes and grade 2 fruit. Peruvian imports are projected to increase through June before peaking in volume in July. Columbian avocados will enter the market the 2nd week of June through September. Avocado volume and pricing should remain promotional throughout the summer.

Bananas



SUPPLY

GOOD

QUALITY

GOOD

Bananas are currently solid and consistent.

MARKET OUTLOOK



Beans



SUPPLY
GOOD
QUALITY
GOOD

Green Beans: **RADAR** Beans are in the middle of a transition from South Florida to Central and Northern Florida growing region. Production in Florida is improving. Georgia is starting. Supplies are improving. Beans on the west coast are elevated due to the extreme cold and rain in Mexico, which is a challenge for the transition. Market remains escalated due to short supply from Mexico and Central America.

Snow Peas: Supplies and market are steady on the East coast while it's limited in the West. Some quality issues have been reported.

MARKET ALERT

Berries



SUPPLY
FAIR
QUALITY
FAIR

Blackberries: Prices for Blackberries are trending down. Production out of Mexico is approaching their seasonal low. California is forecasted to come online during the 2nd week of June. Production out of the Southeast is expected to begin in 1 to 2 weeks.

Blueberries: Prices for Blueberries are trending up. Production is coming out of Mexico, California, the Pacific Northeast, and Georgia. Grower is reporting labor shortages in California and Georgia. Supplies remain tight with good quality.

Raspberries: Prices for Raspberries are trending up. Prices remain elevated and supplies are tight. Watsonville is expected to begin production in mid-June. Warm weather has impacted supplies and quality.

Broccoli



SUPPLY
GOOD
QUALITY
GOOD

Broccoli: Supplies are better with good demand. Markets are not escalated for this week. Supplies coming from Salinas, Santa Maria, and Mexico. Growers are expecting supplies to continue improving. (F.O.B pricing for this week \$15.65 - \$16.75)

Broccolini: Supplies continue to be good. Demand continues to be good. Supplies are expected to continue improving. Supplies should be steady going into next week (F.O.B pricing for this week \$21.95 - \$22.75)

MARKET ALERT

Brussels Sprouts



SUPPLY
FAIR
QUALITY
FAIR

Supplies are very light with fair quality. 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 \$42.45 - \$44.65)

Cabbages



SUPPLY
GOOD
QUALITY
GOOD

Supplies are much better. Market pricing has improved. Prices are steady. Supplies come from Salinas and Oxnard. (F.O.B pricing for this week \$14.65 - \$16.65)

MARKET OUTLOOK

Cantaloupes



SUPPLY
GOOD
QUALITY
GOOD

RADAR Offshore melon continues to wind down. Supplies are extremely light from all ports and expected to be tight until domestic get start toward the end of May. Mexico volume are light crossing in Nogales with little open market. Size peaking on 9s with good sugar and quality.

Carrots



SUPPLY
GOOD
QUALITY
GOOD

Past rains in California could have made some damage in the carrot regions. Plants due to be harvested in the next 1-3 months may be affected, but it is yet too early to tell. A late summer/early fall crop is a concern. Some crops have transitioned to the desert, which was crucial for a good supply.

MARKET ALERT

Cauliflower



SUPPLY
GOOD
QUALITY
GOOD

Supplies are improving. Market pricing will continue to be escalated. Supplies coming from Salinas, Santa Maria, and Mexico. We are expecting supplies to continue improving going into next week. Markets pricing is expected to improve next week. (F.O.B pricing for this week \$22.75 - \$25.25)

MARKET ALERT

Celery



SUPPLY
FAIR
QUALITY
FAIR

EXTREME Supplies continues to be light. Quality is fair and seeder is present. Supplies are coming from Oxnard and Santa Maria. Demand is very good. Market pricing has escalated. Supplies are expected to be limited for the rest of May. Better supplies on 36ct than 24ct. (F.O.B pricing for this week \$28.00 - \$30.00)

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: Market pricing continues to decline as overall yields increase. Recent rain events have promoted fruit growth and coloring but may lead to conditional defects in the form of styler-end breakdown and oil spots that can appear days after initial transport. This is more frequent in large sizes. The crop is peaking on small and mid-sized fruit. Crossings are expected to be elevated throughout the month of May. Small fruit has just about bottomed out in price. Total market stability is expected in the coming weeks.

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 Corn are stable this week. Production is coming out of Florida, California, and Mexico. Georgia is expected to start production in the next week or two.

Cucumbers



SUPPLY

GOOD

QUALITY

FAIR

Prices for Slicing, English, and Persian Cucumbers are trending down. Production is coming out of Central Florida, Georgia, and Mexico. Florida and Mexico will start winding down in the weeks to come. North Carolina and Baja is expected to start in 2 to 3 weeks followed by New Jersey.

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

LIMITED

QUALITY

GOOD

EXTREME Import season has ended earlier, and Mexico is running late to bridge between imports and California season. Supply has become extremely challenging in addition to quality concerns from the tail of the imported fruit. The market will be exceedingly volatile, and supplies will be difficult to manage. It is strongly advised to be open to substitutions or alternatives through the rest of May.

MARKET OUTLOOK

Herbs



SUPPLY

FAIR

QUALITY

FAIR

Herbs from Colombia continues to struggle due to the weather, especially **Chervil**. Quality are fair. Expecting to improve in the next few weeks. Herbs from Mexico has improved along with labor but still struggle with quality.

Cilantro: ALERT Supplies continue to be light with fair quality. Market pricing continues to remain escalated. Supplies are shipping out of Salinas and Santa Maria. Supplies will be light for the next few weeks. (F.O.B price for this week \$18.65 - \$20.25)

Honeydews



SUPPLY

FAIR

QUALITY

GOOD

RADAR Honeydews continue to struggle with sizing from Mexico. Sizing are primarily 5s with good brix and quality. Flexibility with sizing is recommended at the time of loading. Production is expected to get better. Market has increased. Supplies are steady until mid-May and will start to decline for the transition to the desert. Early fields will be predominant with 12s. Larger sizes are projected to start once later field break sometime between June 1st to 5th. Expect to see a potential gap as grower transition to the San Joaquin Valley, as the start date is delay until July 10th.

MARKET ALERT

Iceberg



SUPPLY

FAIR

QUALITY

FAIR

Supplies continue to be light. Quality is fair to good. Weights continue to be down due to smaller heads. Cold temperature is the main cause for smaller heads. Supplies are expecting to be limited for the next few weeks. Growers are now harvesting in Salinas and Huron. Expect escalated markets for the next few weeks. (F.O.B pricing for this week \$38.55 - \$41.45)

Kale



SUPPLY

FAIR

QUALITY

GOOD

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

MARKET ALERT

Leaf



SUPPLY

FAIR

QUALITY

FAIR

Green & Red Leaf: ALERT Supplies are better with good quality. Expect to see smaller heads and lighter weight on the field pack cartons due to the cold temperatures at time of harvest. Expect markets to continue improving in the next few weeks. (Green Leaf F.O.B. pricing for this week \$20.65 - \$22.25)(Red Leaf F.O.B. pricing for this week \$26.85 - \$28.95)

Romaine: ALERT Supplies continue to be light. Quality is good. Weight has improved. Expect market pricing to improve in the next few weeks. Supplies are expected to improve in the next few weeks. (Romaine F.O.B pricing for this week \$20.65 - \$22.45)(Hearts F.O.B pricing for this week \$24.65 - \$26.65)

Tender Leaf: Supplies continue to be better with good demand. Quality is good. Market pricing is steady. 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

Mushrooms



SUPPLY
FAIR
QUALITY
GOOD

Mushrooms supplies have improved in the last few months. Growers are reporting better availability across the mushroom category. Price increases seem to have stabilized. Markets are expected to remain steady for now.

Onions



SUPPLY
FAIR
QUALITY
GOOD

Onions are coming from Arizona, California, Idaho, Georgia, New Mexico, Oregon, Texas, and Washington. Demand is good. Quality is good. Market is trending up. All colors available. Colossal and Super Colossal are tight out of California. Washington and Texas are winding down. Some growers have started shipping out of New Mexico. Arizona is expecting to start next week. There are some imported onions available. 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 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 \$10.75 - \$11.45)

MARKET ALERT

Peppers Bell



SUPPLY
GOOD
QUALITY
GOOD

Prices for Green, Red and Yellow Bell Peppers are trending up. Growers are reporting tighter supplies for Peppers out of Central Florida. Production out of Georgia should begin in a week or two. Should see product out of the California Desert in a week or so as Mexico winds down.

MARKET ALERT

Peppers Chili



SUPPLY
GOOD
QUALITY
GOOD

ALERT (Anaheim & Poblano) Prices for Chili Peppers are mixed. Prices for Anaheim and Poblano Peppers are elevated. Production is coming out of Central Florida and Georgia. Baja starts up around the end of the month.

Pineapples



SUPPLY
FAIR
QUALITY
GOOD

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

MARKET OUTLOOK

Pineapples



SUPPLY

FAIR

QUALITY

GOOD

RADAR The pipeline is yet to be back to normal. Demand exceeds supplies. 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

Demand is slightly down. Supply and market pricing are steady. Crops are still down from the previous year. Suppliers are anticipating it will get tighter in the next month or so. Planting for next season in eastern Idaho is finishing up. An ongoing dispute between surface water irrigators and groundwater pumpers could impact eastern Idaho growers for the coming season. This will affect the pre-cut as well.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow and Zucchini Squash are trending down. Production is coming out of Central Florida, Georgia, and Mexico. Mexico is winding down as their winter season comes to a close. Growers out of Georgia are reporting good weather. North Carolina, California, and Baja are expected to start production at the end of May.

Strawberries



SUPPLY

GOOD

QUALITY

GOOD

Prices for Strawberries are trending up. Growers are reporting good sales for the Mother's Day holiday. The market has tightened as a result. Growers anticipate that supplies will improve following the Mother's Day holiday.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for 20 lb Rounds, Grapes, and Cherries are stable this week. Prices for 25 lb Rounds and Roma are working their way up a bit. Growers out of Mexico and Florida are forecasting tighter supplies as we move into the middle of May. Production will start working its way North up the East Coast going forward.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Supplies are good on all sizes excepts for small seedless are a bit tight. Minis remain a little tight in all areas as offshore are winding down. Volume out East and Florida is good. Mexican melons are shipping out of Edinburg and Nogales. Mexico volume is expected to ramp up in a couple weeks. Texas production is ramping up.



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. **Melons** are expecting to transition in May from imports to domestic. Extreme alert on **Grapes** due to the offshore season ending early and Mexico has been delay in starting due to weather. Extreme alert for **Celery** with light supplies for May. **Iceberg, Green Leaf, and Red Leaf** are experiencing smaller head and lighter weight due to the cold weather at time of harvesting.

The Link Between Highly Processed Foods and Brain Health

By Sally Wadyka | May 4, 2023 | New York Times

Eating packaged foods like cereal and frozen meals has been associated with anxiety, depression and cognitive decline. Scientists are still piecing together why.

Roughly 60 percent of the calories in the average American diet come from highly processed foods. We've known for decades that eating such packaged products — like some breakfast cereals, snack bars, frozen meals and virtually all packaged sweets, among many other things — is linked to unwelcome health outcomes, like an increased risk of diabetes, obesity and even cancer. But more recent studies point to another major downside to these often delicious, always convenient foods: They appear to have a significant impact on our minds, too.

Research from the past ten or so years has shown that the more ultraprocessed foods a person eats, the higher the chances that they feel depressed and anxious. A few studies have suggested a link between eating UPFs and increased risk of cognitive decline.

What's so insidious about these foods, and how can you avoid the mental fallout? Scientists are still working on answers, but here's what we know so far.

What qualifies as an ultraprocessed food?

In 2009, Brazilian researchers put food on a four-part scale, from unprocessed and minimally processed (like fruits, vegetables, rice and flour) to processed (oils, butter, sugar, dairy products, some canned foods, and smoked meats and fish) and ultraprocessed. "Ultraprocessed foods include ingredients that are rarely used in homemade recipes — such as high-fructose corn syrup, hydrogenated oils, protein isolates and chemical additives" like colors, artificial flavors, sweeteners, emulsifiers and preservatives, said Euridice Martinez Steele, a researcher in food processing at University of Sao Paulo, Brazil. This classification system is now used widely by nutrition researchers.

UPFs make up a majority of the packaged foods you find in the frozen food aisles at grocery stores and on the menu at fast-food restaurants — 70 percent of the packaged foods sold in the United States are considered ultraprocessed. They're increasingly edging out healthier foods in people's diets and are widely consumed across socioeconomic groups.

"Ultraprocessed foods are carefully formulated to be so palatable and satisfying that they're almost addictive," said Dr. Eric M. Hecht, an epidemiologist at the Schmidt College of Medicine at Florida Atlantic University. "The problem is that in order to make the products taste better and better, manufacturers make them less and less like real food."

What effect do ultraprocessed foods have on mental health?

Recent research has demonstrated a link between highly processed foods and low mood. In one 2022 study of over 10,000 adults in the United States, the more UPFs participants ate, the more likely they were to report mild depression or feelings of anxiety. "There was a significant...

[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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