



WEATHER UPDATE

Yuma— No precipitation on the 10-day forecast. Sunny and partly cloudy with highs in the mid 70s and lows in the upper 40s. **Mexico (Culiacan)**— Sunny and partly cloudy week with highs in the mid 80s and lows in the lower 50s. **Florida, Southern**— Erratic weather patterns all week. Possible showers on Sunday and Friday with colder days and nights mid week. Highs in the upper 70s and lows in the upper 30s. **Oxnard**— Cloudy and partly cloudy all week with highs in the mid 60s and lows in the mid 40s. **Salinas**— Possible showers on Tuesday and leading into the week of Jan 27th. Partly cloudy all week with highs in the mid 60s and lows in the mid 40s. **Idaho**— Limited sun with highs in the upper 20s and lows in the upper teens.

TRANSPORTATION

The National Diesel Average has been recorded at \$3.064 3.079 down \$0.015 a gal from last week and up \$0.088 gal from last year. NPC continues to monitor and track diesel fuel averages by state as well as reported truckload freight rates on a weekly basis. **Transportation continues to work through its most significant structural changes in years in regards to new laws and regulations stressing available truck volume and controlling drivers. Trucks have loosened up across the country but still have slight shortages in the following regions: San Luis Valley Colorado, Pac North West and Eastern North Carolina.**

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MARKET ALERT

- BROCCOLI
- CAULIFLOWER
- GREEN ONIONS
- GREEN & RED LEAF
- GREEN PEPPERS
- ICEBERG
- POTATOES
- SUMMER SQUASH
- TENDER LEAF (Arugula)
- TOMATOES



MARKET OUTLOOK

Apples



The market is steady this week. No major changes to the apple category.



Asparagus



ON THE RADAR—The Peru season is coming to a close and the Mexico markets are starting up. The market continues to tighten up and we anticipate this trend to continue for a couple weeks. West Coast imports are struggling in comparison to import product landing on the East Coast. Markets are beginning to spike and supply is becoming short, especially on the West Coast. No prorates at this time but markets will remain up until Mexico is in full swing at the end of January.



Avocados



Markets are stable and supplies are plentiful but the market will begin to see activity leading up to the Superbowl. The CA market has began but is only supplying about 5 percent of the industry. The supply will continue to increase as we move into February and continue through Spring. Overall flavor and quality has been improving.



Bananas



No issues on the horizon with banana supply. Good quality is being harvested with slightly smaller sizing. Plantains are also seeing better numbers and should continue to be headed in a positive direction.



Berries



Blackberries— : The Blackberry market is starting to tighten up a bit as growers out of Mexico moved their excess fruit. Some quality issues are being reported due to the excess fruit in the marketplace.



Blueberries: Plenty of volume coming out of Mexico right now and quality is great. Prices are expected to stay steady next week.

Raspberries: Raspberry supplies significantly tightened up this week. The weather is not cooperating thus making supplies for Raspberries very tight right now.

Broccoli



Supply has been light this week due to cooler temperatures. Harvest schedules have been impacted and delayed due to plants not maturing on time. Markets are currently escalated and are expected to remain similar for the next couple weeks.



MARKET OUTLOOK



Brussels Sprouts



Supplies are holding steady and production has been good. The sprouts have had a great couple months but the supply is looking to begin to turn downwards as northern production areas end. As northern supply decreases over the next week and MX begins to start up, we anticipate a more active market while the gap is bridged.

Cabbage



Production has been impacted and supply is short at the moment. Moving into next week supply should rebound along as better weather conditions arise.

Carrots



Jumbo carrots have continued to be tight nationwide. Overall sizing has slowed leaving supply somewhat limited due to colder weather. We will keep a close eye on how supply progresses in the coming weeks. We have seen a limited market but overall a release as we've moved through January.

MARKET ALERT

Cauliflower



Cold weather has began to affect the harvest with cauliflower just like with many other desert veg items. We plan for markets to remain escalated for another week or two.

Cantaloupes



Import programs have continued to show good sizing and quality remains very consistent with solid brix levels and good supply. Overall supply will drop some as growing areas begin to move. Sizing has remained on the larger size and is projected to remain that way for the coming weeks.

Celery



Supply continues to increase with Mexico in full swing. Growers are expecting some release as volumes continue to increase. Sizing has been slightly smaller and heavier on 30s and 36s.

Corn



Corn supplies are still limited this week as suppliers attempt to catch up from recent shortage. Expect high markets for the next week. Quality is good to fair. With warmer weather on the forecast, production should increase and market pressure should release some.

MARKET OUTLOOK



Cucumbers



QUALITY



SUPPLY



Supplies are on the tighter side due to previous rains in all growing area. Cucumbers are rebounding but product will remain on watch until supply and quality can catch up and stabilize after continued rain in growing regions over the past month. Mexico production has begun and will continue to help with short supply in the coming weeks.

Eggplant



QUALITY



SUPPLY



Supplies and prices remain steady. Solid production out of Mexico and Texas currently.

Grapes



QUALITY



SUPPLY



Grapes have now become 100% import fruit and markets are still high. Peruvian Red Seedless—The market is up on import product reaching the high 20's and low 30's. Supply is limited but increasing. Peru Green Seedless—Some Sweet Globes are available but overall supply is limited. Sugarones are also available and helping out with overall demand. Chilean red and green grapes will help some with supply shortage but not enough to keep demand at bay.

Green Beans



QUALITY



SUPPLY



Harvests on green beans have been steady and with holiday's over, demand is finally equal with supply and the market is balanced.

Herbs



QUALITY



SUPPLY



No major problems with herbs to be reported at this time.

Honeydews



QUALITY



SUPPLY



Import programs have continued to show good sizing and quality remains very consistent with solid brix levels and good supply. Overall supply will drop some as growing areas begin to move. Sizing has remained on the larger size and is projected to remain that way for the coming weeks.

MARKET OUTLOOK



Iceberg



MARKET ALERT

QUALITY



SUPPLY



Colder temperatures were adding extra attention to iceberg over the past two weeks. There is still a lot of pressure on pricing due to limited yields but overall the markets appear to be stabilizing. Iceberg will remain on watch heading into next week due to demand exceeding supply.

Kale



QUALITY



SUPPLY



Supplies have remained steady and are looking good with numbers in the coming weeks. Good quality reported by multiple growers.

Leaf



MARKET ALERT

QUALITY



SUPPLY



Romaine: Romaine has rebounded but is also still heavily on watch due to colder temperatures leading to possible discoloration and quality issues. Field QA teams are heavily monitoring harvests until warmer weather arrives this coming week.

Green Leaf/ Red Leaf/ Butter (Boston) Lettuce: Product is on alert with lower volumes on both colors. Colder weather has held back supply and has kept the market slightly up. Seeing some quality concerns such as fringe burn and blistering due to the weather conditions .

Tender Leaf (Arugula)



MARKET ALERT

QUALITY



SUPPLY



Supplies are still **extreme** this week due to rains and freezing weather over the last few weeks out of Yuma. Growers are **pro-rating Arugula** and Baby Kale right now. The tight market conditions are expected to last another 1 to 2 weeks.

Lemons & Limes



QUALITY



SUPPLY



LIMES: The lime market was on the incline which is historically how the market trends in January, until this week. There has been a surplus of supply crossing the border and the sizing has been well balanced and distributed. This has kept markets low and FOB's have been in the mid teen range. We will closely monitor this as it's atypical for January trend.

LEMONS: Lemons supply and quality continue to be flush with heavy supply. Very little fluctuation from last week with FOB pricing out of CA and AZ markets. The season continues to be strong and the price gap between choice and fancy is small.

MARKET OUTLOOK



Onions



QUALITY  SUPPLY 

Overall the onion market is slightly increasing but is holding steady with the supply and demand balance. The increase happens as pack houses take time off during the holiday breaks. As the month of January unfolds, we anticipate slight increases in FOB's to continue as pack houses work through previously harvested product and cull through product.

MARKET ALERT

Onions, Green



QUALITY  SUPPLY 

Supply has dropped coming out of Mexico due to weather being below normal levels. Onions are not maturing fast enough to keep up with normal demand. There is an expectation for the market to rebound in the next week, but overall supply has been hit and will remain escalated up through next week.

Oranges



QUALITY  SUPPLY 

The CA and FL orange markets are in solid supply and in good quality across the board. The choice market has been hovering around the low to mid teens and fancy market stronger on larger fruit. Better prices in the low teens on small fruit. No signs of immediate change in the orange market in the upcoming weeks.

Pears



QUALITY  SUPPLY 

Barts are now available with sizes peaking on 100/110/120ct. New crop Washington D'Anjou are available and quality is excellent.

MARKET ALERT

Peppers, Bell



QUALITY  SUPPLY 

ALERT on Green Peppers

The Green Pepper market is still very tight. Rains and cooler weather has impacted product coming out of Florida and Mexico. Pricing for Red and Yellow Peppers is stable and at more normal levels.

Peppers, Chili



QUALITY  SUPPLY 

The chili pepper market is steady this week but is showing some lower numbers on **Anaheim's**. Jalapeno, Poblano peppers, and tomatillos are in good supply with good quality. Overall good demand and good quality. Expect the markets to remain steady into next week.

MARKET OUTLOOK



Pineapples



No market concerns and product quality has been great. We are seeing a smaller sized fruit with less volume on 5/6's in the market.



Potatoes



EXTREME ALERT: The potato market remains extreme with FOB's reaching the high 30's/low 40's on larger spuds. Still seeing quality concerns in certain areas based on conditions during harvest. We have a long road to go this season and are still battling supply issues due to lack of overall supply in the marketplace. We recommend flexibility on sizing to get through this extreme situation and we will keep you updated on this unprecedented market.



Squash



Weather in Mexico and Florida has impacted the supplies of Yellow and Zucchini Squash. Supplies are extremely tight and cost are elevated. Growers are reporting challenges with quality. They're also expecting the market to remain the same for another week or two.



Strawberries



Strawberries - Rains in California and Florida will impact production this weekend and the first of next week. Quality has been impacted too. Forecast for warmer weather in Florida will help increase production and quality should improve.

Stem Berries are expected to be beautiful and bountiful for the Valentine's Day holiday. That being said, things can change on a dime if rains or cooler weather comes in to play in the next week or two.



Tomatoes



ALERT on 20lb 2 layers and 25lb packs.

Rounds - Prices remain **elevated** due to weather related challenges out of Florida and Mexico last month. Small size fruit is just starting to see some price relief. Expect tight supplies, possible **pro-rates** and elevated prices for the next 2 to 3 weeks.

Roma tomatoes - Prices for Roma Tomatoes are attractive right now compared to round tomatoes. Romas could be a great item to substitute for rounds until the market stabilizes.

Cherry and Grape Tomatoes - There is good supplies pricing on cherries and grapes right now. Production out of Florida and Mexico is steady.



MARKET OUTLOOK

Imported Fruits Most Loved by Americans

Worldstopexports.com

“Bananas -excluding plantains- avocados and grapes, are the US’ three most popular imported fruits. Collectively they represent 44.6% of the value of all fresh or dried fruits imported into the United States during 2018.

Overall US demand totaled US\$15.2 billion worth of non-frozen fruits imported during 2018. That dollar amount equals a 32.4% increase from the value of America’s imported fruits during 2014 and a 3.7% year-over-year uptick from 2017 to 2018.

In contrast, exported fruits from the US were valued at \$6.6 billion—less than half of America’s total spent on fruits imported from 115 countries or territories around the globe. Thus the US incurred a formidable -\$8.6 billion trade deficit in the international trade of fruits for 2018.

America’s most popular imported fruits

The following list showcases the top 15 imported fresh or dried fruits most in demand by Americans. Combined, these 15 fruit categories represent 87.4% of the overall value of US-imported fruits.

1. Bananas: US\$2.6 billion (17% of US-imported fruits)
2. Avocados: \$2.4 billion (16.1%)
3. Fresh grapes: \$1.7 billion (11.5%)
4. Fresh cranberries, bilberries: \$1.2 billion (8.2%)
5. Fresh raspberries, blackberries, mulberries, loganberries: \$1138.5 million (7.5%)
6. Pineapples: \$726 million (4.8%)
7. Lemons, limes: \$651.6 million (4.3%)
8. Guavas, mangoes: \$637.3 million (4.2%)
9. Fresh strawberries: \$609.5 million (4%)
10. Melons not watermelons: \$402.9 million (2.6%)
11. Watermelons: \$359.1 million (2.4%)
12. Mandarins including tangerines: \$309.6 million (2%)
13. Oranges: \$244.1 million (1.6%)
14. Plantains: \$235 million (1.5%)
15. Apples: \$226 million (1.5%)

Fastest-growing among the top 15 categories from 2014 to 2018 were fresh cranberries and bilberries (up 84.7%), fresh raspberries, blackberries and similar berries (up 83.7%), lemons and limes (up 65.1%), oranges (up 60.1%), fresh strawberries (up 56.3%) then avocados (up 52.7%).

On the other hand, the value of fresh apples imported into the United States fell by -20.3% over the five-year period.

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!

Imported Fruits Most Loved by Americans (cont.)

Top Suppliers by continent and country

Latin America including Mexico plus the Caribbean furnished over four-fifths (81.3%) of the imported fruits that Americans consume. Asia placed a distant second accounting for 11.3% of US imported fruits.

Smaller percentages were sourced from Africa (2.8%), Europe (1.3%) and Oceania (1.1%) led by New Zealand and Australia. Closer to home, North American trade partner Canada (2.1%) also helped satisfy Americans' hunger for fresh or dried imported fruits.

Listed below in descending order are the top 10 countries that supplied 87.4% of total fruits imported by America in 2018.

1. Mexico: US\$5.9 billion (38.7% of US-imported fruits)
2. Chile: \$2 billion (13%)
3. Guatemala: \$1.2 billion (7.8%)
4. Vietnam: \$1 billion (6.9%)
5. Peru: \$977 million (6.4%)
6. Costa Rica: \$928.9 million (6.1%)
7. Ecuador: \$420.9 million (2.8%)
8. Honduras: \$353.6 million (2.3%)
9. Canada: \$325.2 million (2.1%)
10. Colombia: \$195.3 million (1.3%)

Leading US imported fruits from Mexico are avocados and strawberries. Grapes and blueberries are the most valuable fruits shipped to America from Chile and Peru. Bananas top the list of fruits imported from Guatemala, Ecuador and Honduras.

American imports of fresh tamarinds, lychees and passion fruit top the list of fruits imported from Vietnam. Pineapples and bananas represent the most lucrative fruits for suppliers in Costa Rica.”