



WEEK 44: October 30 - November 5, 2023

MARKET OUTLOOK

Transportation:

National Diesel Average: \$4.545

Compared to Last Year: \$3.749

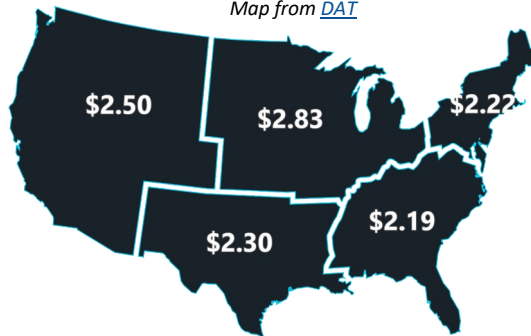
National Fuel Surcharge: \$0.58

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

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 with highs in the 70s and lows in the 50s with sunny skies on Monday.

Salinas, CA: Partly cloudy with highs in the 70s and lows in the 40s to 50s with PM sunny skies on Saturday.

Yuma, AZ: Sunny skies with highs in the 80s and lows in the low 60s.

Immokalee, FL: PM showers, partly cloudy and scattered thunderstorm with highs in the 80s and lows in the 60s.

Idaho Falls, ID: Partly cloudy and sunny skids with highs in the 40s to 50s and lows in the upper teens to 30s with AM showers on Sunday.

MARKET ALERT

Asparagus

Banana

Beans: Green Beans & Snow Peas

Berries: Blackberries & Blueberries (Force Majeure)

Broccolini

Brussels Sprouts

Carrots

Corn

Grapes

Limes

Mushrooms

Pepper Chili

Tomatoes: Cherry & Grape



MARKET OUTLOOK

Apples



SUPPLY

GOOD

QUALITY

GOOD

The Washington State Apple Crop is experiencing strong growth and good supply, with an estimated 2023 crop of 134 million boxes, compared to 110 million this past season. The size profile benefits the foodservice industry, with a peak of 100/113ct and more 125s than 88ct. All varieties, from Red Delicious to Cosmic, have seen substantial gains, resulting in better value and availability throughout the season. Summer 2024 won't bring Granny Smith's prices to Washington like they did recently. The growing conditions have been ideal, and no weather issues have been reported.

MARKET ALERT

Asparagus



SUPPLY

FAIR

QUALITY

FAIR

Asparagus production is limited in all growing regions, with most production in Mexico in southern Baja. Northern Baja is closing due to seasonality, while the Sonora Desert is opening fields in higher elevations. Peru is at 50% of normal volume due to El Niño, and volume will not increase until the north opens fields in 2-3 weeks. Markets are active with less asparagus available.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

Last week's total harvest increased by 50% from 38.4 million pounds, with Hurricane Otis making landfall near Acapulco as a Category 5. Rain is forecast, and harvest delays are likely. Fruit demand is strong, but the industry is working on replenishing the supplies after a 2-week deficit. Because of the recent rain, the size curve has not sized up as quickly as it should have. Fruit growth requires constant sunshine. Harvest is peaking in the 60s, with crop estimates for strong volumes throughout the Super Bowl. For the next 2-4 weeks, promotions are available, with the best value on 60s and smaller fruits.

MARKET ALERT

Bananas



SUPPLY

FAIR

QUALITY

GOOD

The demonstrations in Guatemala are causing roadblocks, affecting movement within the country. However, the situation is improving, with fruit possibly being a color stage behind the desired ripeness due to delays in transportation.

MARKET ALERT

Beans



SUPPLY

LIMITED

QUALITY

FAIR

Green Beans: Supplies continue to be challenging through October, with potential improvement in volume and supply the second week of November. The market will remain elevated. Hurricanes impacted the growing regions of Georgia and Mexico, resulting in crop losses. Guatemalan beans are starting to arrive in the market.

Snow Peas: Supplies are improving with fair to good quality in the west. Supplies are scarce in the east due to protests in Guatemala, but the situation is expected to improve next week, with roads opening and more containers expected to arrive.

MARKET OUTLOOK

MARKET ALERT

Berries



SUPPLY

BAD

QUALITY

FAIR

Blackberries: **ALERT** Prices are trending up. Production is coming out of Mexico. Supplies remain tight. The impact from Hurricane Lidia could put more pressure on supplies during the weeks to come.

Blueberries: **FORCE MAJEURE** Prices are trending up. Production is coming out of Argentina, Chile, Mexico, and Peru. Not enough volumes to meet the demand. The market is expected to remain tight until late December, when higher volumes of imports from Chile arrive.

Raspberries: Prices for Raspberries are trending down. Production is coming out of Watsonville and Mexico. Growers are reporting good quality out of both growing areas.

MARKET ALERT

Broccoli



SUPPLY

FAIR

QUALITY

FAIR

Broccoli: Supplies are steady with strong demand. Supplies are available from Salinas, Santa Maria, and Mexico. Growers are reporting good yields this week. Market pricing has also improved, and supplies should continue improving in the next few weeks. Prices will not be escalated this week. (F.O.B. pricing for this week \$14.00 - \$15.00)

Broccolini: **ALERT** Supplies continue to be light. Demand has increased. Supplies are expected to be limited for a few weeks. Growers are reporting brown bead and flowering defects. Yields are affected by quality issues. Market pricing continues to be escalated. (F.O.B. pricing for this week \$24.75 - \$27.55)

MARKET ALERT

Brussels Sprouts



SUPPLY

FAIR

QUALITY

FAIR

Supplies are starting to show signs of improvement. Quality is reported as improved. Demand is strong. Market pricing and contracts pricing is expected to remain escalated. Market pricing also seems show signs of improvements. (F.O.B. pricing for this week \$39.00 - \$42.00)

Cabbages



SUPPLY

GOOD

QUALITY

GOOD

Supplies are steady with good quality. Growers are reporting better availability. Market pricing has improved. Products are coming from Salinas and Santa Maria. (F.O.B. pricing for this week \$15.00 - \$17.00)

Cantaloupes



SUPPLY

GOOD

QUALITY

GOOD

The cantaloupe crop has faced significant challenges due to a virus that has weakened early Arizona fields, resulting in yields below 50%. This has led to smaller fruit production and inadequate nutrient levels. The need for flexibility in sizing has become crucial due to the lack of alternatives elsewhere. Healthy fields are expected to break by Saturday or Monday, volumes will be lower but improved sizing. Early quality has been good, with decent internal quality. However, early morning dew may cause some dirt to show externally due to wet conditions in the field packed melon. Guatemalan cantaloupe is expected to arrive in Florida towards the end of the week.

MARKET OUTLOOK



MARKET ALERT

Carrots



SUPPLY
FAIR
QUALITY
GOOD

Mexico's carrot region is facing challenges due to water and germination issues, causing crop losses and further complicating the domestic market. California and other regions are also facing weather-related challenges, with jumbos and cellos in low supply. Prorates may be expected, and table carrots may be a good substitute. Tropical storm Hilary disrupted plantings in Imperial Valley & Riverside County, California, and Kern County, California, causing a week delay in planting and reduced yields. Hurricane Idalia's devastation in Georgia has significantly affected carrot farms, potentially impacting January volume.

Cauliflower



SUPPLY
GOOD
QUALITY
GOOD

Supplies have improved with strong demands. Supplies are available from Salinas, Santa Maria, and Mexico. Growers are reporting good yield. Market pricing has improved, and supplies should continue improving in the next few weeks. Prices will not be escalated. (F.O.B. pricing for this week \$13.00 - \$14.00)

Celery



SUPPLY
GOOD
QUALITY
GOOD

Supplies are steady. Quality has improved. Supplies are currently coming from Salinas and Santa Maria. Market pricing will be steady the next few weeks. Supplies and prices will be steady for the next few weeks. (F.O.B. pricing for this week \$13.00 - \$14.00)

MARKET ALERT

Citrus



SUPPLY
BAD
QUALITY
FAIR

Limes: **ALERT** Cost continues to be elevated, especially on large fruit. There's a significant price spread across the size spectrum; the lime market is expected to stay escalated. The new bloom has caused a significant pricing gap across the sizing spectrum, with potential record-breaking numbers compared to historical trends in Q4. Extreme heat and humidity have also affected quality and shelf life, leading to low availability. Peak sizing currently consists of small fruit, 230s and 250s, accounting for 70% of total harvested yields. Consider expanding your specification to accommodate crop trends and ensure supply.

Lemons: The start date for lemons is the week of October 31st, with D2 and D3 struggling to meet demand. Lemons continue to be tight as the start date approaches. The crop is up 50% this season, with sizing of 140/115/165 and quality of 60%/40% fancy/choice grade. The lemon production is predicted to rise by 50% this season due to the harvesting of new trees.

Oranges: Navels are expected to begin the second week of November if the fruit meets the required Acid to Brix ratios. Production of packable fruit is slightly down by 5% from last season, with more Choice than Fancy. The late Navel crop is expected to be light industry wide.



MARKET OUTLOOK

MARKET ALERT

Corn



SUPPLY

FAIR

QUALITY

FAIR

Prices for Corn are trending up. Supplies out of the East is tightening up. Their planting and production cycle was disrupted due to recent rain events and hurricane activity a few months ago. Production out of the West continues to see tight supplies as production transition to Arizona.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Slicing Cucumbers are trending up. Production out of the East is coming out of Georgia, New York, and Tennessee. Local programs are winding down. Recent rain events in the East are putting some pressure on supplies and prices. Production out of the West is ramping up out of Mainland Mexico.

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.

Grapes



SUPPLY

FAIR

QUALITY

GOOD

California red seedless grape volumes are declining, but they will be present until November. Green seedless grapes will be available until early December. The main challenge is red seedless. Peru is shipping and increasing volumes as California's supply decline, but it may not provide enough volume to sustain current pricing as prices are expected to have a slight increase.



MARKET OUTLOOK

Herbs



SUPPLY
GOOD
QUALITY
FAIR

The quality of herbs has improved with better weather conditions, and both domestic and imported **Chervil** production continues improving.

Cilantro: Supplies are slightly better with fair quality. Market pricing has improved. Supplies are shipping out of Salinas and Santa Maria. Growers are expecting supplies and markets to improve in the next few weeks. (F.O.B. pricing for this week \$15.00 - \$17.00)

Honeydews



SUPPLY
FAIR
QUALITY
GOOD

The honeydew market is strong, with more Mexican fruit expected to enter the market next week, while Arizona production remains steady, primarily in 5/6s.

Iceberg



SUPPLY
GOOD
QUALITY
GOOD

Supplies and quality have both improved. Weights are expected to be better with improved lettuce. Yields are much better. Some growers are starting to harvest in Huron and Salinas. (F.O.B. pricing for this week \$13.00 - \$14.00)

Kale



SUPPLY
GOOD
QUALITY
GOOD

Supplies are steady with good quality and demand. Supplies should remain steady for a few weeks. Market pricing is steady. (F.O.B. pricing for this week \$11.65 - \$13.65)

Leaf



SUPPLY
GOOD
QUALITY
GOOD


Green & Red Leaf: Supplies are steady. Fair quality with irregular sizing, light fringe burn, and some seeder. Markets are expected to remain steady. Growers will be challenged with quality in the coming weeks. (Green Leaf F.O.B. pricing for this week \$11.00 - \$12.00)(Red Leaf F.O.B. pricing for this week \$10.00 - \$11.00)

Romaine: Supplies continue to be good with good quality. Due to irregular weather, growers are experiencing some quality issues. Carton weights are fair. Expect market pricing to remain steady for the next few weeks along with supplies. (Romaine F.O.B. pricing for this week \$11.00 - \$12.00)(Hearts F.O.B. pricing for this week \$15.00 - \$17.00)

Tender Leaf: Supplies are good with good demand. Quality is good to fair. Supplies and availability are improving due to better weather. Steady market pricing and supplies are to be expected in the next few weeks. (F.O.B. pricing for this week \$4.75 - \$5.00)

MARKET OUTLOOK



<p>MARKET ALERT</p> <p>Mushrooms</p> 	<p>SUPPLY FAIR</p> <p>QUALITY FAIR</p> <p>Mushroom supplies are expected to be limited for the next few weeks going into the holidays due to quality issues with raw ingredients in compost. Markets are expected to react to these limited supplies, leading to an escalated price.</p>
<p>Onions</p> 	<p>SUPPLY GOOD</p> <p>QUALITY GOOD</p> <p>Quality is good to excellent with steady demand. The market is steady. All colors and sizes are shipping out of the Northwest. Utah is starting. Products are beginning to get a little tight in Idaho-Oregon and Washington, especially on medium red and white. Colorado has all colors and sizes available. This will also have an impact on precut.</p>
<p>Onions Green</p> 	<p>SUPPLY GOOD</p> <p>QUALITY GOOD</p> <p>Supplies are slightly better. Supplies are finally improving from previous hurricane crop damage, and summer heat wave the growing area received. Current supplies are coming from Mexico. Markets will not be escalated this week. Expect fair quality. Supplies and quality will improve in the next few weeks. (F.O.B. pricing for this week \$11.00 - \$12.00)</p>
<p>Pears</p> 	<p>SUPPLY GOOD</p> <p>QUALITY GOOD</p> <p>The Pear crop is expected to be of excellent quality, like the Apple Crop. Bartlett Crop is projected to have the same amount as last season, while Bosc is expected to have a larger crop, making prices on 100s and smaller better. Red Pears are expected to peak on 80/90ct, while Anjou's in the Pacific Northwest is down by 20%. Overall, the quality is good with size a profile 80/90/100ct.</p>
<p>Peppers Bell</p> 	<p>SUPPLY FAIR</p> <p>QUALITY GOOD</p> <p>Prices for Green and Yellow Bell Peppers are trending up. Prices for Red Bell Peppers are trending down. Production for Green Bell Peppers out of the East is working its way South. Production out of GA is currently feeling the impact of recent rain events and hurricanes from earlier this year. Many local programs in the Northeast are ending. Production out West is coming out of California and Washington State. Production out of the California Desert is running a few weeks behind this year.</p>
<p>MARKET ALERT</p> <p>Peppers Chili</p> 	<p>SUPPLY POOR</p> <p>QUALITY POOR</p> <p>Prices for Chili Peppers are mixed this week with an upward bias. Chili Pepper production out of the East is working its way down to the South. Many local programs out of the Northeast are ending. Production out of the West is coming from California and Mexico. Supplies are expected to remain tight for the next 4 weeks or longer.</p>

MARKET OUTLOOK

Pineapples



SUPPLY

GOOD

QUALITY

GOOD

The pineapple volume is strong, with the size curve starting to shift back towards larger size fruit.

Potatoes



SUPPLY

GOOD

QUALITY

GOOD

Good quality from all growing regions. The market continues to trend down. Yields are up by 8.3% overall from the previous year. This year potato crop is in good condition. This will also affect precut.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow and Zucchini Squash are trending down. Production in the East is coming out of Georgia. Florida is not far behind. In the West, Santa Maria is winding down as Hermosillo continues to see supplies increase.

Strawberries



SUPPLY

GOOD

QUALITY

GOOD

Prices for Strawberries are trending up slightly. Production is coming out of Oxnard, Salinas, Santa Maria, and Watsonville. Growers are reporting good quality out of Oxnard and Santa Maria. Florida production is forecasted to start late November.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

ALERT (Cherry & Grape) Prices for 20 lb Round, Roma, and Cherry Tomatoes are trending up. Prices for 25 lb Round and Grape Tomatoes are steady. The weather is cooling down in the Northeast and production is working its way South to Ruskin, FL. Out West, production is winding down in California. Baja and Eastern Mexico are currently reporting steady light volumes.

Watermelons



SUPPLY

GOOD

QUALITY

GOOD

Watermelons are in good supply on seedless and minis, with limited supplies in Florida, Southern Texas from Mexico, and Nogales picking up volume from Northern Mexico, ensuring good quality.



MARKET OUTLOOK

Produce Category Overview

The annual transition from Salinas to Yuma is expected to happen in November, which will have an impact on all Green Leaf, Iceberg Lettuce, Romaine Lettuce, Romaine Hearts, Processed Salads, and Baby Tender Leaf items such as Spring Mix, Baby Arugula, and Baby Spinach. Once transition start, expect to see several challenges for the month of November.

Asparagus are limited in all growing regions but expected to improve in 2-3 weeks. **Blackberries** are escalated with tight supplies due to the weather. **Blueberries (FORCE MAJEURE)** prices are escalated with limited supplies expected to last through late December. **Brussels Sprouts** are slightly better but remain escalated. **Carrots** are short on jumbo and cello due to weather. **Chili Peppers** remain tight due to the weather. **Green Beans** supplies continue to be limited with better supplies expected in the second week of November. **Limes** market is escalated, particularly on large fruit. **Mushrooms** are beginning to get tight leading into the holiday.

Integrating AI into the produce industry

October 26, 2023 - Analysis, By Greg Johnson

ANAHEIM, CA – Your produce company isn't left behind if it isn't using artificial intelligence now.

But that time may be coming, quickly.

At the annual IFPA BB #:378962 Global Produce and Floral Expo, several speakers addressed AI and its use in the produce industry.

To sum it up, they say you have nothing to fear from AI except maybe from not using it.

"AI has gone from nowhere to now here," said IFPA CEO Cathy Burns in her state of the industry address.

She said it has the potential to improve many functions in the industry, such as improving customer experiences in foodservice and retail; reducing food waste; dynamic retail pricing; and helping consumers better meal plan and tracking nutrition and calories.

It has the ability to automate many job functions, which will mean workers will have to adapt their skills.

"With AI, can it reduce employee burnout?" she asked. "We have to work with this technology, not fight it. It's no replacement for institutional knowledge and relationships."

Elliott Grant, CEO of Mineral, an Alphabet company, liked AI to an Ironman suit rather than the Terminator, meaning, it's a tool to help humans work better not a replacement for humans.

Humans plus AI are better than either are separately, he said.

Grant said AI can run experiments much faster than we can now or have ever been able to do, and there's power in being able to know things that were previously unknowable.

One example he gave was produce inspections. Human inspectors tend to work on go or no-go, while AI can give details to a product's quality, which can enable a company to make better decisions about the product.

A company doesn't have to start using AI right now, but it should collect as much data as possible now for when it does start using AI, Grant said.

Johnny Taylor Jr., CEO of SHRM, said many workers fear AI will take away their jobs. He believes it will create more jobs than it eliminates, but it will force workers to update their skills.

Grant says AI has the potential to shake up the business world.

"AI won't replace companies," he said. "Companies that use AI will replace companies that don't use AI."

[Read full article HERE](#)



MARKET OUTLOOK

Fall Transition Schedule - Yuma Season - 2023

Grower/Shipper	Current Location	Transitioning	Commodity	Transition Dates	CITY	Transition Dates	CITY
Bengard Ranches	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Yuma, AZ	Cauliflower			11/27/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Huron, CA	Lettuce Iceberg	10/16/23	HURON, CA	11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Lettuce Green Leaf/Red Leaf	10/9/23	OXNARD, CA	11/13/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Lettuce Romaine	10/4/23	OXNARD, CA	11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Celery	11/27/23	OXNARD, CA	11/27 - 6/10/24	OXNARD, CA
Church Brothers	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/21/23	YUMA, AZ
Church Brothers	Salinas, CA	Yuma, AZ	Cauliflower			11/21/23	YUMA, AZ
Church Brothers	Salinas, CA	Huron, CA	Lettuce Iceberg	10/20/23	HURON, CA	11/4/23	YUMA, AZ
Church Brothers	Salinas, CA	Yuma, AZ	Lettuce Green Leaf / Red Leaf			11/15/23	YUMA, AZ
Church Brothers	Salinas, CA	Huron, CA	Lettuce Romaine	10/12/23	HURON, CA	11/8/23	YUMA, AZ
Church Brothers	Salinas, CA	Oxnard, CA	Celery			11/6/23	OXNARD, CA
Church Brothers	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Broccoli Crowns			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Cauliflower			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Iceberg			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Green Leaf / Red Leaf			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Romaine			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
Green Gate Fresh	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/27/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Yuma, AZ	Cauliflower			11/27/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Iceberg	10/16/23	HURON, CA	11/19/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Green Leaf / Red Leaf	10/9/23	HURON, CA	11/17/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Romaine	10/5/23	HURON, CA	11/17/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Oxnard, CA	Celery	11/27/23	OXNARD, CA	11/27 - 6/10/24	OXNARD, CA
Taylor Farms - CA	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
The Salad Farm	Hollister, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ

Have you ever wondered what happens during a transition? Click on the video link below to see all of the actions.

Taylor Farms [Video](#)

Church Brothers [Video](#)

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!

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