



WEEK 13: March 27 - April 2, 2023
MARKET OUTLOOK

Transportation:

National Diesel Average: \$4.185

Compared to Last Year: \$3.236

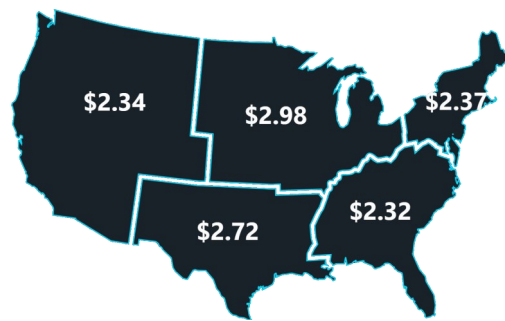
National Fuel Surcharge: \$0.55

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

National Posted Rate per mile

previous week's average outbound reefer rate for each region

Map from [DAT](#)



Regional Weather Update:

Oxnard, CA: Cloudy, rain/shower and sunny throughout the week with highs in the 50s & 60s and lows in the 40s.

Salinas, CA: Cloudy, rain, and showers throughout the week with highs in the 50s & 60s and lows in the 40s.

Yuma, AZ: Sunny skies with highs in the 70s & 80s and lows in the 50s.

Immokalee, FL: Cloudy, PM thunderstorms, and sunny skies through the week with highs in the 80s & 90s and lows in the 60s.

Idaho Falls, ID: Cloudy with rain/snow showers throughout the week with highs in the 30s and lows in the mid-teens to 20s.

MARKET ALERT

- Arugula Baby**
- Berries: Blackberries, Blueberries & Strawberries**
- Broccoli**
- Broccolini (Extreme)**
- Carrots (Radar)**
- Chili Peppers: Serrano Peppers**
- Herbs: Chervil**
- Limes (Radar)**
- Mushrooms (Extreme)**
- Pepper Bell: Green**
- Yellow Squash**

MARKET OUTLOOK



Apples



SUPPLY
FAIR
QUALITY
GOOD

With less than 100 million cases, WA crop is the smallest since 2005 with the average usually more than 120 million. Their low volume is a significant issue for growers in Washington State. There is a lack of supplies, a high demand, and obviously regional supplies exist. Michigan and New York both have good crops, so it's about how WA can stay in for as long as possible and take advantage of the various varieties that have been grown. The cost of production labor has skyrocketed. Expecting to remain tight through the season until offshore arrives in April.

MARKET ALERT

Arugula



SUPPLY
LIMITED
QUALITY
FAIR

ALERT (Baby) Supplies are limited. Some growers fare better than others. Expect quality to be only fair. Some growers are keeping everyone to strict loading averages and are prorating orders. This market will be volatile for a few weeks. (F.O.B Pricing for this week - Contract pricing)

Asparagus



SUPPLY
GOOD
QUALITY
GOOD

In preparation for the Easter weekend, the asparagus market is leveling off. Standard and Large have excellent volume, but XL and Jumbo remain light. Mexico's volume is still excellent and expected to go through April. Due to market conditions, Peru has slowed air cargo. Due to production from Mexico and Peru, the market is slow.

Avocados



SUPPLY
GOOD
QUALITY
GOOD

Last week 71.2M lbs. crossed into the US, surpassing the Super Bowl pull. The pipeline for Cinco de Mayo is expected to fill up in the next two weeks, bringing in large volumes. Demands remains strong. Because of their higher oil content, Mexican avocados have a rich and excellent flavor profile. Fruit is ripening faster; thus it is critical to maintain a cold chain and store at 38°F. Pricing continues to adjust, with larger fruit pricing declining and smaller fruit pricing increasing. Average national retail price increased to \$1.18 each, up from \$1.41 at the same time last year. Due to Holy Week in Mexico, harvest will be light the week of April 2nd. California harvest to date is just over 4M lbs., compared to nearly 50M lbs. at this time last year. With stronger pricing and favorable weather, California harvest may ramp up going into April. Peru is expected to export 624,000 tons globally in 2023, a 12.5% increase over 2022. The US is expecting to get at least 125,000 tons, the same as last year. The price gap between 48s and 60s continues to shrink. The USDA had a \$7.50 margin 2 weeks ago, and it's now down to \$2.00. Expectations are for 60s to surpass 48s again, probably this week. The market will most likely remain inverted for several weeks. While price points on various sizes are shifting, the overall market has had stable average USDA pricing for the previous 3 weeks and is projected to continue through Cinco de Mayo.

Bananas



SUPPLY
GOOD
QUALITY
GOOD

Banana volume continues to be stable.

MARKET OUTLOOK



Beans



SUPPLY
GOOD
QUALITY
GOOD

Green Beans: Supply is good, and market is steady. Quality is good. No supply issue expected unless Mother Nature says otherwise.

Snow Peas: Supplies have slowed down due to market condition and quality out East. Supplies and market out West is steady.

MARKET ALERT

Berries



SUPPLY
FAIR
QUALITY
FAIR

Blackberries: **ALERT** Prices for Blackberries are trending up. Supplies remain limited. Rain events in California and heat in Mexico has kept the market unstable. Retailers are leaning on Blackberries & Raspberries for their promotions due to the current tight strawberry market.

Blueberries: **ALERT** Prices for Blueberries are steady. Supplies are tightening up due to the season ending in Chile. Production out of Florida is in the early stages and will pick up going forward. Growers are expecting tight supplies for the next 3 to 4 weeks. Quality is good.

Raspberries: Prices for Raspberries are steady. The market is expected to tighten up in the weeks to come. Retailers are leaning on Blackberries & Raspberries for promotions due to the current tight strawberry market. Supply and Quality are both good.

MARKET ALERT

Broccoli



SUPPLY
SHORT
QUALITY
GOOD

Broccoli: **ALERT** Supplies continue to be light. Demand continues to be very good. Market pricing has escalated. Current supplies are coming from Yuma & Santa Maria. Supplies are also coming out of Mexico. We are expecting for supplies to be limited due to previous cold temps in Yuma. (F.O.B pricing for this week \$21.55 - \$22.45)

Broccolini: **EXTREME** Supplies continue to be very short due to the unusual cold weather. Demand exceeds supplies. Quality is Fair. Growers are pro-rating orders to try and supply everyone with something. Market is expected to remain unstable for a few weeks. (F.O.B. pricing for this week \$32.45 - \$34.75)

Brussels Sprouts



SUPPLY
GOOD
QUALITY
GOOD

Supplies continue to be very good. Quality is good. Demand continues to be steady. Good volume from Mexico. Steady demand is expected the next few weeks. (F.O.B pricing for this week \$16.75 - \$18.65)

Cabbages



SUPPLY
GOOD
QUALITY
GOOD

Supplies are improving. Growers are reporting better availability. Market pricing has improved. Prices will not be escalated. Product is coming from Yuma and Imperial Valley. (F.O.B pricing for this week \$14.15 - \$18.45)

MARKET OUTLOOK

Cantaloupes



SUPPLY
FAIR
QUALITY
GOOD

Offshore cantaloupe continues to be light with low demand. On the West, Guatemalan production has switched from 9/12s to mostly 9s while the East coast and Texas are heavy on 12s. Retail are starting to promote for the Easter holiday, which will help with movement and restabilize the market. Quality has been excellent. Brix level is 13%-15%.

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.

Cauliflower



SUPPLY
GOOD
QUALITY
GOOD

Supplies and market pricing have improved. Current supplies are coming from Yuma, Santa Maria, and Mexico. Cold weather hindered growth, resulting in supply shortages. Anticipate supplies to improve further over the coming week. (F.O.B pricing for this week \$19.15 - \$19.95)

Celery



SUPPLY
GOOD
QUALITY
GOOD

Supplies are much better with good quality. Supplies are coming from Oxnard and Yuma. Demand is very good. Market pricing is expected to decline. (F.O.B pricing for this week \$17.65 - \$18.65)

MARKET ALERT

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: ALERT Prices are steadily rising as Mexico's supply situation gets more problematic. Crossings have dropped significantly, and yields are mostly small fruit. Large sizes will continue to be limited. Availability is likely to decrease until mid-April, adding further upward pressure on market pricing. Supply will be short. This week's rain will help with overall fruit health and sizing in the growing region. Blanching will become more visible when the fruit's general coloration darkens; please note the distinction between blanching and yellowing, as blanching is a quality defect and yellowing is a conditioned defect.

Lemons: California lemons are still being harvest in D1 and the fruit are still looking fine. Growers are packing mostly Fancy 115s and larger. D1 season will go until the first of June before it transitions to D2 and import lemons.

Oranges: Navels have hit their stride. Quality is great with nice brix and color. Until the end of the navels, size will remain an issue; it is now peaking on 113s, limited 56s, and larger. Most shippers will be done with the Navels at the end of May.

MARKET OUTLOOK



Corn



SUPPLY

GOOD

QUALITY

FAIR

Prices for Corn are trending down. Supplies are picking up in Florida. Pricing is expected to continue to come down. Production out of California continues to be impacted by rain. Supplies remain tight on the West Coast.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Slicing Cucumbers, Persian and English Cucumbers are trending down. Growers out of Florida and Mexico are reporting good volumes and quality. Growers are forecasting steady prices for the next few weeks.

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

GOOD

QUALITY

GOOD

Reds and greens imports have been slightly lighter than originally forecasted, but volume continues to increase week by week hitting their peak in Easter.

Herbs



SUPPLY

GOOD

QUALITY

GOOD

Weather continues to have an impact on all Colombian herbs. Weather affects both imported and domestic **Chervils**. For the West coast, all varieties of herbs are having inconsistent production due to weather and low yield in the growing region. Quality is fair.

Cilantro: Supplies are steady. Quality has improved. Market pricing did increase slightly. Product shipping out of Oxnard, Imperial Valley, and Yuma. Expect supplies to be steady for the next few weeks. (F.O.B pricing for this week \$18.45 - \$19.60)

MARKET OUTLOOK

Honeydews



SUPPLY
LIGHT
QUALITY
GOOD

Imported honeydew production continues to be light with market pricing still escalated. Sizing are primarily 5/6s with some 8s and jumbo. Light supplies are expected to through the rest of the season. External appearance has been clean with solid internal quality with good brix. Offshore honeydew has improved with appearance and sugar level.

Iceberg



SUPPLY
GOOD
QUALITY
FAIR

Supplies are very good, and quality is fair. Weights are down due to smaller heads. Supplies is expecting to be steady for a few weeks. Harvest is coming from Yuma and Imperial Valley. (F.O.B pricing for this week \$10.00 - \$11.00)

Kale



SUPPLY
FAIR
QUALITY
GOOD

Supplies are steady with good demand. Quality is good. Supplies should stay steady for a few weeks. Market pricing is steady. (F.O.B pricing for this week \$15.45 - \$17.75)

Leaf



SUPPLY
GOOD
QUALITY
GOOD

Green & Red Leaf: Supplies continue to be very good. Quality is fair. Expect to see Fringe burn, and some wind damage. Markets and supplies are stable. Harvest is coming from Imperial Valley and Yuma. (Green Leaf F.O.B. pricing for this week \$8.00 - \$9.00)(Red Leaf F.O.B. pricing for this week \$9.00 - \$9.95)

Romaine: Supplies and quality are both good. Weights are back to normal. Expect to see some epidermal peel and blistering. Growers are doing everything they can to pack the cleanest product possible. Harvest is coming from Yuma and Imperial Valley. (Romaine F.O.B pricing for this week \$9.95 - \$11.25) (Hearts F.O.B pricing for this week \$14.65 - \$16.15)

Tender Leaf: Supplies are steady. Demand continues to be good. Fair quality has been reported by some growers. Market pricing is normal. Harvest is coming from Yuma. (F.O.B pricing for this week \$4.75 - \$5.15)

MARKET OUTLOOK

MARKET ALERT

Mushrooms



SUPPLY
SHORT
QUALITY
FAIR

EXTREME The mushroom industry continues to struggle with shortage of labor, as well as cost inflation increases in raw materials. Specifically Corrugated cardboard and packaging materials, in particular. Price increase in freights nationally have greatly impacted cost to mushroom growers. Labor, transportation, and packaging all contribute to the higher price of mushrooms.

Shitake: EXTREME Shitake mushroom supplies will be short due to an uncontrollable rise in the cost of imported Shitake logs from China, and prices will fluctuate almost weekly. Long delays in unloading shipments at ports have resulted in some supply disruptions. This is due to a labor shortage and limited freight availability.

Onions



SUPPLY
GOOD
QUALITY
GOOD

Onions are shipping out of Idaho, Oregon, Texas, and Washington. Demand is down. Quality is good. Market is down. Imperial Valley is expected to start the last week of April. Import onions are wrapping up and will have a smooth transition to Rio Grande Valley in the next 7-10 days. Super Colossal and Colossal Yellow onions continue to fetch a premium pricing due to the limited availability. All colors available. Vidalia are expecting to start mid April. Planting for next season crops in the west has been delayed due to cold and rainy weather. Growers are waiting for the field to dry before beginning to plant. This will also have an impact on precut.

Onions Green



SUPPLY
GOOD
QUALITY
GOOD

Supplies are better. Market pricing is back to normal. Green onions are coming from Mexico. Abnormal cold temperatures have slowed down the supplies. Supplies are expected to continue to improve the next few weeks. (F.O.B pricing for this week \$11.50 - \$12.70)

MARKET ALERT

Peppers Bell



SUPPLY
FAIR
QUALITY
FAIR

ALERT (Green) Prices for Green Bell Peppers are trending slightly up. Prices for Red and Yellow Bell Peppers are trending down. The Bell Pepper market is unstable as crops transition from Winter to Spring crops. Volumes are expected to pick up in the weeks to come.

MARKET ALERT

Peppers Chili



SUPPLY
FAIR
QUALITY
FAIR

ALERT (Serrano Peppers) Prices for Chili Peppers are trending mostly down. The market is stabilizing, and prices have been coming off this week. Serrano Pepper pricing remain elevated.

MARKET OUTLOOK

Pineapples



SUPPLY

GOOD

QUALITY

GOOD

Pineapples are tight and will remain so until April. 7/8ct Pineapples are slightly more available.

Potatoes



SUPPLY

FAIR

QUALITY

GOOD

Russet potatoes continue to be limited and demand is down. Storage crop are still available. Good supplies on new crops from Florida with excellent quality. Supply is steady and demand continues to be light. Market is steady due to the overall short crop this season. There is availability to meet demand. Precut potatoes will be impacted as well.

MARKET ALERT

Squash



SUPPLY

FAIR

QUALITY

FAIR

ALERT (Yellow Squash) Prices for Yellow & Zucchini Squash are trending slightly down. The Yellow Squash market is tighter than the Zucchini market. Florida is starting to ramp up with volume. Supplies continue to be a bit tight out of Mexico due to recent rains and cold weather.

MARKET ALERT

Strawberries



SUPPLY

FAIR

QUALITY

FAIR

Prices for Strawberries are trending. Production out of Florida has basically ended for the season. Production out of Mexico is on a downward trend as their season is coming to a close. California continues to be impacted by rain. Growers in Watsonville and Salinas are reporting 15 to 20% crop damage due to flooding. All the recent bad weather is expected to impact future production due to delays with plantings. Growers will discourage retail ad activity. That will help get everyday business orders filled.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for 20 lb Round, Cherries and Roma Tomatoes are trending down. Prices for 25 lb Round and Grape are stable. Growing conditions has been more favorable in Florida and Mexico. That's helping to keep the markets stable.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Watermelons are a little tight. Seedless are shipping from Mexico while mini are out of Edinburg and Nogales. Quality has been good. Florida is expecting to start harvesting mid-April. California started with lower volumes due to the seasonal transition gap. Market is elevated.



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 expected to happen soon, which will have an impact 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. Extreme alert for **Broccolini** due to weather and will be unstable for a few weeks.

Reeling from another round of storms, California growers fight to recover farmland from flooding

By **KRISTIN LEIGH LORE** March 23, 2023

California residents, farmers and ranchers have endured two intense storm systems in recent months that brought significant rainfall, snow and flooding to many areas. Storm-ravaged Californians are now bracing for another round of late-season weather with potentially more rain, wind and flooding in the central and southern parts of the state, according to the National Weather Service.

What does this onslaught of extreme weather mean for California growers kicking off their spring growing season?

"Farmers in the Salinas Valley were picking up the pieces from January's flood event when hit by the March storm and subsequent flooding," Chris Valadez, president of the Grower-Shipper Association of Central California, told The Packer. "We also know some areas didn't suffer direct flooding in January that flooded this time around; thus, the number of acres flooded will be more significant.

"People are hurting," Valadez continued. "An extraordinary effort has been and remains underway to pick up the pieces from not one but two successive devastating flood events that impacted farms, farmworkers and the services sector that depend upon a viable, operating agricultural economy."

President Joe Biden, at the request of California Gov. Gavin Newsom, recently declared a state of emergency for 43 counties across the Golden State and is working to provide economic relief to the farm and food workers who need it, regardless of immigration status and storm damage.

"These farmers are highly resilient and will come back stronger," said Valadez said.

WHAT TO EXPECT OUT OF CALIFORNIA FIELDS THIS SPRING

The tenacity and determination of growers notwithstanding, it's inevitable that the back-to-back storms will affect what growers are able to harvest and ship in the weeks ahead.

"Weather has very much hurt our Salinas-area growers, with delays and disaster meaning lost fields due to flooding and other setbacks," Andy Martin, president of A&A Organic Farms, told The Packer.

Not only is it challenging to farm under storm and flood conditions in much of California right now, once harvested, transporting perishable produce through the state could be hindered.

"Business is also off due to all the road closures from the excess water and flooding," Martin said.

Flooding events have caused an issue not often seen in California in recent years: oversaturated soil. After so much precipitation, farmland

[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