



MARKET OUTLOOK

SUPPLY = GOOD | QUALITY = GOOD

Apples



This year's Washington State Apple Crop is now estimated at 121 million boxes vs shipping 133.5 million last year. This is a significant drop from last season but WA will have Apples to sell throughout the Year. Eastern Washington had 2 major wind storms late September/Early October where in some areas devastated orchards. Plus - some varieties did not bounce back from the year before, we call it a light set. Also, late October - we had a few days between 12 and 18 degrees - some apples did not make it through. Reds, Golds, Galas and Gr Smiths are the varieties mostly impacted by the loss. The Farm to Family Box Program has been a huge part of the Price Increases seen in the past 2 Months.

SUPPLY = GOOD QUALITY = GOOD

Asparagus



Peru: Low Volume, Low Demand, Good Quality. (Mexican Volume is affecting Peruvian demand.) (est. next arrival is within 2 weeks.) Mexico: Steady Demand, Good Quality, Good Volume.

SUPPLY = GOOD | QUALITY = GOOD

Avocados



It is Holy Week in Mexico and harvest is even lighter than originally expected. Currently inventory is very high and demand has been sluggish, but we do expect that once the excess begins to move through the pipeline, market condition could strengthen. Many feel as warmer weather and avocado-friendly holidays perk up demand, it's likely the market will be hungry for that additional fruit and industry pull will strengthen and maintain. Prices have come off a few dollars to begin the week, after softening towards the end of last week. There is a wide range of pricing in the marketplace depending on who you talk to and the varying situations suppliers find themselves in with aged or excess fruit. Some are shedding fruit at a loss. Dry matter continue to stair step up slightly, hovering just below the 30% level, with fruit breaking quickly once triggered. 100% Normal crop is now being harvested in Mexico.

SUPPLY = FAIR | QUALITY = GOOD

Bananas



Weather is getting better and better in the topics. This will cause an increase in quality. Supply is still lower due to the hurricanes in 2020.

SUPPLY = FAIR | QUALITY = FAIR

MARKET ALERT

Berries



Blackberries - : Prices for Blackberries is trending up this week. Supplies are extremely tight out of Mexico due to recent weather and the Easter Holiday demands. Growers are expecting tight supplies for at least the next few weeks. Hopefully the market will stabilize somewhat after the holiday. **Blueberries**: Prices for Blueberries is trending up as production out of Chile winds down. Production out of Florida and Central Mexico is ramping up but supplies are tight due to the Easter holiday. Growers are expecting prices to stabilize as production on the East Coast and Mexico ramps up. **Raspberries**: Prices for Raspberries is trending up this week. Supplies are tight due to the recent cold weather in Mexico and Easter Holiday demands. Growers aren't expecting the market to come down for at least a few more weeks

SUPPLY = GOOD | QUALITY = GOOD

Beans, Green



Seeing good demand, supply and quality.



MARKET OUTLOOK

Broccoli



Broccoli Supplies are steady for this week. Supplies were light at the beginning of the week. Expecting better supplies for next week. Good quality is being reported at this time. Good demand with Broccoli Crowns for this week.

SUPPLY = FAIR | QUALITY = GOOD

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Brussels Sprouts



Brussels Sprouts supplies continue to be light this week. Growers continue reporting lower yields than expected for this week. Quality is showing signs of improvement for this week. Good demand continues with Brussels sprouts for this week.

SUPPLY = FAIR | QUALITY = GOOD

MARKET ALERT

Carrots



Due to extreme cold temperatures jumbo carrots will be very tight almost none for 3 to 4 weeks. Table carrots are suggested as sub. We are Harvesting in AZ, CA and GA right now. GA has been getting really poor yields. Arizona and CA have good yields but are being impacted by cool weather. The fluctuation between warm and cool is causing cracking in the cello carrots. It is also stunting the growth of the carrots so we are getting very little jumbo material.

SUPPLY = FAIR | QUALITY = FAIR

Cauliflower



Cauliflower supplies are steady for this week. Growers are reporting light supplies as some growers finish the transition to Salinas CA. Fair quality is being reported at this time. Supplies are expected to improve for next week.

SUPPLY = GOOD | QUALITY = GOOD

Cantaloupes



Strong cantaloupe volume continues as we reach the peak of the Spring crop. Sizing has been primarily regular 9s and 12s. There should be very good movement over the next 7-14 days which could assist in strengthening the market some. We do anticipate a decrease in overall production for the next two weeks before one last spike in the middle of April before supplies begin to taper off as the season concludes around May 21st. Cantaloupe quality, as you can see in the pictures below, have been running at optimum levels both externally and internally.

SUPPLY = GOOD | QUALITY = GOOD

Celery



Celery supplies continue to be good this week. Growers are reporting good supplies coming out of Oxnard CA and Imperial Valley CA. Good quality is being reported at this time. Demand for Celery continues to be very good this week.

MARKET ALERT

SUPPLY = FAIR | QUALITY = FAIR

Corn



Corn is basically unchanged from last week. Production out of South Florida is still depressed from freezes and wet weather over the last few months. Production out of Brawley California is projected to start in 2 to 3 weeks.



MARKET OUTLOOK

Cucumbers



Prices for Cucumbers is trending up this week. Imports from Mexico is running slightly down and production out of Florida is just starting to ramp up their summer crop. Production out of Honduras is done for the season. Growers are expecting cost to stabilize over the next few weeks.

SUPPLY = FAIR | QUALITY = GOOD

Eggplant



Prices for Eggplant is trending down this week. Growers are reporting month end low demands. That's putting pressure on costing.

SUPPLY = FAIR | QUALITY = GOOD

MARKET ALERT

Grapes



Red Grape market hold steady from last week with good supply and quality. We are seeing a two tier market on the West Coast where slow market has caused older inventory to be priced lower but quality is poor on those. New, Good Quality grapes, have a higher price attached. Green grapes remain high, tight and on alert.

SUPPLY = FAIR | QUALITY = FAIR

Honeydews



Honeydew production has been consistent with very manageable numbers coming in to satisfy regular contract business. Markets have been steady in the double digit range as Mexican production remain very light. Sizing has been primarily 5/6s with a decent number of 8s coming in to ensure those orders are covered. Pictures below show the quality on recent honeydew arrivals which are providing some of the most consistently high brix levels we have seen this season.

SUPPLY = GOOD | QUALITY = GOOD

Iceberg



Iceberg supplies are expected to be good for next week. Growers are reporting good quality coming from Huron CA. Expect good quality for this week weights are expected to be fair. Demand for Iceberg Lettuce continues to be good for this week.

SUPPLY = GOOD | QUALITY = GOOD

Leaf



Romaine: Romaine supplies are expected to be good this week. Growers are reporting improved quality coming from Huron CA. Expect fair quality for this week with some occasional epidermal peel and some blistering. Growers are doing everything they can to pack the best looking product.

SUPPLY = FAIR | QUALITY = FAIR

Green Leaf/ Red Leaf/ Butter (Boston) Lettuce: Leaf supplies are expected to be steady going into next week. Fair quality is been reported at this time.

Tender Leaf: Steady supply

SUPPLY = FAIR | QUALITY = FAIR

MARKET ALERT

Lemons & Limes



LIMES: Lime Availability in Mexico is remains tight, Veracruz experienced some rain over the weekend and expecting more rain tomorrow, there will be quality issues on product arriving to the border on the next few days. Growers in Mexico will only harvest until Wednesday due to the holy week. We are expecting the market to remain steady until md-next week.

LEMONS: Currently picking our D1 (Central Valley) crop and it is very nice but we are seeing some challenges with softer fruit this season due to the weather patterns we have been experiencing. The rain helped with growth on lemons and changed our peak size from a 165 to a 95 size. We are anticipating the market to start to come off on 95's and larger as shipper need to start picking heavy to get thru the D1 crop. We would normally end D1 in May but most shippers are talking about having D1 well into June this season.



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SUPPLY = FAIR | QUALITY = GOOD

Mushrooms



Mushroom demand will continue to trend upwards, especially with dining in limits being lifted nationally. The Retail business has kept the suppliers a float during the Covid 19 pandemic; however with Foodservice on the rise, suppliers will have to shift volumes around. Consumers continue to look for plant based meat alternatives and mushrooms fit into this eating trend. Consumers are also looking for healthier nutrient dense food options and mushrooms also fit this trend. Some mushroom companies are doing some farm retooling to insure they can anticipate and meet expected demand increase. Suppliers are seeing increases in film, labels and carton, as well as labor costs continue to be on the rise. Suppliers are having a tough time finding the help needed, as un-employment is in many cases the better options short term in hourly pay; currently the suppliers are staffed to cover their needs as they increase wages. As far as new varieties, many new restaurants are focusing on clean and organic produce offerings. Exotic mushroom consumer interest continues to grow with Enoki. Royal Trumpets, Maitake, Piopino, and of course Chantrelle and Morel which are foraged mushrooms and not truly commercially grown.

SUPPLY = GOOD | QUALITY = GOOD

Onions



The market remains steady. Yellows \$7-9, mediums a bit tight. Reds around \$7. Good quality and demand as we finish up in ID/OR over the next 6 weeks or so.

SUPPLY = GOOD | QUALITY = GOOD

Onions, Green



Green onion supplies will be steady going into next week. Growers are reporting improved quality for next week.

SUPPLY = GOOD | QUALITY = GOOD

Oranges



Fruit is great this season, due to the weather patterns we are experiencing in California we are seeing challenges in the fruit getting softer with puff we are working thru these challenges but we are seeing less of a pack out due to this. Fruit is also getting larger in size which is typical for this time of year. Fruit is currently peaking on 56/ 72 /88 – we are seeing a small percentage of 113/138 size fruit. We anticipate this to be the case the rest of navel season, which will mean if we find a strong demand for 113/138's we will start Valencia oranges earlier than normal, possibly the middle of April.

SUPPLY = GOOD | QUALITY = GOOD

Pears



2020 is a clean crop of pears and quality is very good. Barts will be available through the last week of Feb or first week of March. New crop starts mid-August. Anjou's – through August, just in time for new crop. Red Pears – through June – new crop starts mid-August. Bosc – through April – new crop starts early September.

SUPPLY = FAIR | QUALITY = FAIR

Peppers, Bell



Prices for Green and Yellow Peppers is stable this week. Prices for Red Peppers is trending slightly down. Production out of Florida is fairly steady while production from Mexico is down this week. California will start shipping peppers in a couple weeks. Growers are reporting challenges with quality. Please check all arrivals thoroughly.



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SUPPLY = FAIR | QUALITY = FAIR

Peppers, Chili



Prices for Chili Peppers are trending steady this week. Production will be moving from South to central Florida in a couple weeks. Production out of Mexico is steady. Just like with Green Peppers, please check Chili Pepper arrivals thoroughly for quality issues.

SUPPLY = GOOD | QUALITY = GOOD

Pineapples



Volumes on smaller sizes are available while the larger size pineapples are still below normal volumes although they are picking back up some.

SUPPLY = GOOD | QUALITY = GOOD

Potatoes



Potatoes up \$0.50-1 this week. Seeing good quality and demand, no current concerns. NAPMN expects US growers to plant 31,000 more acres to potatoes in 2021 than they planted in 2020. At 952,000 acres, this year's planted area would be up 3.4% from the 2020 crop. However, it would remain 1.2% below 2019 acreage. Processing potatoes in Washington, Idaho, and Maine account for most of the expected increase.

SUPPLY = GOOD | QUALITY = FAIR

Squash



Prices for Yellow Squash is trending down this week. Prices for Green Squash remains steady. Production is coming out of South Florida, Central Florida and Mexico. Green and Yellow Squash a very good value right now. Look for production to start out of California toward the end of the month.

SUPPLY = FAIR | QUALITY = FAIR

MARKET ALERT

Strawberries



Prices for Strawberries is running slightly down this week. Supplies are winding down out of Central Mexico and Florida. Production in California was impacted earlier in March by rain and hail. The Easter Holiday demands added to supply pressures over the last couple weeks too. The weather in California is forecasted to improve this week-end. Look for improved pricing after Easter.

SUPPLY = GOOD | QUALITY = GOOD

Tomatoes



Prices for 20 lb 2 Layer Round Tomatoes and Roma's are running steady this week. Prices for 25 lb Round Tomatoes, Grapes and Cherries are trending down at this time. Growers are reporting low month end consumer demands. Production is starting up out of the Ruskin and Palmetto Florida areas. That's keeping prices in check. All tomatoes are a good value at this time.



MARKET OUTLOOK

PMA and United Fresh to create new global trade association

By [TOM KARST](#) March 31, 2021

“With hopes of unveiling a more complete picture of merger details at Fresh Summit this fall, the boards of directors of the Produce Marketing Association and the United Fresh Produce Association have reached an agreement in principle to combine the groups by the first of the year.

Determining a new name for the combined association will be part of the branding process undertaken during the balance of 2021, association leaders said. Previous high-profile efforts to merge the two national produce associations fell short in 2012, 2007 and 1995.

In July 2012, the two boards ended 18 months of negotiations, and the ultimate sticking point was who would lead the combined organization.

At that time, the PMA board insisted its CEO Bryan Silbermann be the head of the group, and the United Fresh board wanted the position to be open, which could have led to its CEO Tom Stenzel being the leader.

In the 2021 agreement to merge, the groups said the new association formed will be led jointly by PMA’s Cathy Burns and United Fresh’s Stenzel as co-CEOs throughout 2022. After that time, Burns will become the sole CEO.

In a call with members of the media on April 1, Burns and Stenzel said they began talking about the merger possibility about six months ago. The COVID-19 pandemic and the limitations it placed on industry meetings and association revenue was not the main driver for the discussions, both said. With a personal relationship since the days of the Produce Traceability Initiative more than a decade ago, the association leaders said they have a relationship built on trust.

“I would argue my relationship with Tom was the driving factor that brought us to this point,” Burns said, noting both organizations have strong cash reserves, and both are forecasting to be profitable in 2021.

From a balance sheet perspective, PMA is much bigger than United Fresh, with PMA’s 2019 program revenue of more \$26 million reported on its tax forms compared with about \$9 million in program revenue for United Fresh in the fiscal year from July 2018 to June 2019.

The resulting new association from the merger of United Fresh and PMA will combine resources and expertise to enhance member services, increase advocacy before government and the public, help members grow their businesses, and drive consumption of fresh produce and demand for floral products, the groups said.

The two associations will continue to operate as independent organizations through 2021, with the new association to be launched Jan. 1, 2022.”

<https://www.thepacker.com/news/industry/updated-pma-and-united-fresh-create-new-global-trade-association>

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!