



## WEATHER UPDATE

**Yuma** - Mostly sunny next week with highs in the 90s and lows in the 60s. **Oxnard** - Sunny to partly cloudy next week with highs in the 60s and lows in the 50s. **Mexico (Culiacan)**- Sunny to partly cloudy next week with highs in the upper 90s and lows in the upper 50s. **Florida, Southern**— Sunny to partly cloudy next week with chances of thunderstorms throughout the week. Highs in the 90s and lows in the 70s. **Idaho**—Sunny to partly cloudy next week with highs in the 70s and lows in the 30s.

## TRANSPORTATION

The National Diesel Average has been recorded at \$3.169 up \$0.022 a gal from last week and down \$0.070 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 are in good supply in most of the country, however there is a shortage in Central and South Florida.**

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## MARKET ALERT

Broccoli/ Florets  
Broccolini  
Brussel Sprouts  
Cauliflower/ Florets  
Celery  
Green Grapes  
Red Cabbage  
Yellow Squash

# MARKET OUTLOOK



## Apples



QUALITY  SUPPLY 

With less volume in this crop & supplies starting to dwindle because of seasonality, expect to see strengthening prices in the coming months. The 2019-20 crop is trending two weeks later than last season's crop start & that will add pressure on supply & demand during the late summer transition. The top five apple varieties in March 2019 were Gala, Honeycrisp, Fuji, Red Delicious and Granny Smith. As spring fades into summer, it will be time for produce departments to focus on seasonal crops. Conventionally, Red Delicious, Pink Lady, Gala, Braeburn & bulk Granny Smith are all areas to look at for apple promotions.

## Asparagus



QUALITY  SUPPLY 

The asparagus market has firmed up a bit this week as we head into the Mother's Day push. Quality has been reported good to fair depending on location. Mexico's production is down due to the transition in growing regions. Volume out of CA will continue to increase as we get further into their season. Peru is producing a fair amount of volume & is expected to increase in the next couple of weeks.

## Avocados



QUALITY  SUPPLY 

We are currently in a 2-tiered market. There is older fruit that is getting harder to move at any price, but prices in the field are reflecting higher markets. Growers are holding out & picking much less this week, waiting for shippers to come back into the field to reload. Fruit will not hold for as long as it did as we reach some of the highest oil content of the year, which is great for taste profile, but bad for shelf life. #2 fruit is plentiful, & at this point, shippers may start substituting #1 fruit for #2 fruit if they need to. California is building inventories, & with it being a smaller volume year, they haven't had the commitments to move the fruit like they have in the past. Peru has started to send fruit towards the US and should start arriving in the next few weeks.

## Bananas



QUALITY  SUPPLY 

The markets remain steady with consistent production and supply. Fruit quality is not an issue at this time.

## Berries



QUALITY  SUPPLY 

**Blackberries** – The market is high. The **Mexican** season is winding down & **California** production will not start for several weeks. Quality is very good: berries are deeply colored, juicy, and sweet. Sugar levels range from 12 to 13 Brix.

**Blueberries- Florida** blues are hitting peak production. Good volume! Great quality! **Georgia** continues to ramp up with high bush production, good supply & quality for the next month+. **California** is expecting a big season as well, starting mid-May & running through June.

**Raspberries**- Prices are high. The **Mexican** season is winding down & **California** production will not start for several weeks. Quality is very good.

# MARKET OUTLOOK

## Broccoli



**MARKET ALERT**

QUALITY



SUPPLY



**Broccoli Crowns/ Broccoli Florets** – Supplies are down this week due to some field damage while replanting a few months ago. Unfortunately, not all replanting was done, and going through a gap until new fields are mature enough for harvest. Quality is fair. **Broccolini** supply is tight, as yields continue to be down for this time of year. Expect market conditions to remain for the next 7-10 days.

## Brussels Sprouts



**MARKET ALERT**

QUALITY



SUPPLY



Supplies continue to be extremely short this week. **Mexico** supplies have ended earlier than normal, **Sant Maria** is not ready. With very little supplies available, some growers are subbing orders with small fancy sizes. Most Growers are reporting 50 % -70% less volume available. Expect pro-rates on all orders for the next few weeks

## Cauliflower



**MARKET ALERT**

QUALITY



SUPPLY



Supplies are extremely short this week due to some field damage while replanting a few months ago. Unfortunately, not all replanting was done, and going through a gap until new fields are mature enough for harvest. Some growers will be prorating orders due to limited volume available. (This also includes **Cauliflower Florets**). Good quality is being reported.

## Cantaloupes



QUALITY



SUPPLY



Decreasing arrivals for the offshore cantaloupes over the past 2 weeks has caused the market to spike. With local melons in Florida beginning & domestic melons in Arizona prepared to start within the next 10-14 days, we anticipate the market will settle from its highs. Classic Fruit will continue to have consistent numbers arriving into Florida through the week of May 20th to take care of all contract needs. Sizing is projected to have a nice mix of regular cartons rather than the jumbo fruit that was seen throughout April. Quality has been outstanding the past couple weeks.

## Carrots



QUALITY



SUPPLY



Harvest just started in the Imperial Valley. Quality looks and yields looks good. Demand should fall off some with schools dropping out for summer. Expect no issues that should be a cause for concern.

## Celery



**MARKET ALERT**

QUALITY



SUPPLY



Market continues to remain elevated and supplies continue to be extremely short. We expect no change in the markets until the end of May or early June. Quality is been reported as only fair at this time.

## Corn



QUALITY



SUPPLY



We have a 2 tier market on corn right now. Prices are lower in the East than in the West. California experienced cooler and wetter than normal weather during the planting season. This has caused lowered yields this year.

# MARKET OUTLOOK



## Cucumbers



QUALITY  SUPPLY 

Cucumber supplies remain plentiful in **Mexico**. New fields in Sonora have started and volume continues to ramp up quickly. Sinaloa is still in production and crossings through Nogales are prevalent. Baja & Central Mexico fields are in play as well with crossings through San Diego and McAllen, respectively. **Florida** spring fields are also in production with steady supply & decent quality. Production is expected to start in Georgia toward the weekend. We forecast that volume will ramp up after May 10.

## Eggplant



QUALITY  SUPPLY 

South Florida's eggplant production has picked up a little, as eggs love the hot weather. Quality is average, as there's a lot of older crops out there. Plant City will be the next area with new crops as early as next week with Georgia to come onboard the following week. The West is starting to work through the transition from Mainland Mexico to the California desert, which should get underway in the next few days.

**MARKET ALERT**

QUALITY  SUPPLY 

## Grapes



**Green Seedless (Alerted)**- Mix of quality out there. USDA not showing real market. Some getting repacked to keep quality up. Market extremely tight and prices have sky rocket. **Red Seedless**—Mostly Crimsons but Allison and Timco are around as well as Sweet Celebration. Those varieties are trying to get higher money but there are still a good amount of crimsons holding the market lower.

## Green Beans



QUALITY  SUPPLY 

Most of South Florida's bean crops are done and the Lake area's volume has declined, creating a pocket of lighter availability this week. North Florida & GA growers are on tap to start this weekend, which should improve supply soon. There's weather in the forecast, so hopefully it won't affect quality on these new crops. The West has solid supply of nice beans from Baja, Guasave, and the California desert.

## Herbs



QUALITY  SUPPLY 

Herb supplies this week are steady and quality is reported as good to very good. Basil supply continues to improve and should be in full swing this month.

## Honeydews



QUALITY  SUPPLY 

Honeydew production continues to be strong and will keep going through at least the week of May 20th. With fruit being so big internal quality has been very good with increased yields as well.



# MARKET OUTLOOK

## Iceberg



QUALITY  SUPPLY 

Supplies are good this week, not too heavy or light. Better quality is being reported by multiple growers. Expect to see steady supplies the next few week and good quality.

## Kale



QUALITY  SUPPLY 

The market continues to remain level with steady supplies. Quality is being reported as good. Expect a steady amount of supply with the recent nice weather in the California growing areas.

## Leaf



QUALITY  SUPPLY 

**Romaine** - Supplies are good this week with better quality. Expect to see steady supplies for the next three weeks. Quality is being reported as good and product is looking clean, with some occasional mildew. Weights are hovering around 34-36lbs.

**Green Leaf/Red Leaf and Boston/Butter Lettuce**- Supplies are good this week with better quality being reported. Expect to see steady supplies the next few weeks. Good quality is being reported, some growers are seeing a bit of mildew, but nothing too concerning. Demand is good and weights are in the 18-20lb range.

## Tender Leaf



QUALITY  SUPPLY 

The market is level and stocks are sufficient. Quality is good. Possible insects in the product is always a challenge this time of year. Growers are taking extra steps when packing product to make sure that shipments are insect free.

## Lemons & Limes



QUALITY  SUPPLY 

**Limes**— The market remains very active and supplies remain tight. Market FOBs remain high around \$40s across the board. Expecting to see some relief by the end of the month. Quality is reported as good to very good.

**Lemons**- The market is steady to slightly higher and expected to rise over the course of the month. Market FOBs are in the high \$20s and low \$30s currently. Smaller sizes remain tight. Quality is reported as good to very good.



# MARKET OUTLOOK

## Onions



QUALITY  SUPPLY 

Suppliers are finishing up storage crop out of Oregon and will soon be in California. Slowly starting to get there with full transition in 1-2 weeks. FOBs are low, even reds finally dropped a buck after sitting at \$15 for weeks. White onion supplies are still high and tight.

## Onions, Green



QUALITY  SUPPLY 

The market remains steady with good supply to meet all demand. Growers are reporting good quality, expect markets to be steady for the next few weeks.

## Oranges



QUALITY  SUPPLY 

Oranges are cheap and with good promotable supplies this week. Market FOBs are in the low teens for the most part. Seeing good quality and so-so demand but expect it to increase over the course of the month; that is both in demand and price.

## Pears



QUALITY  SUPPLY 

Spring is well under way and U.S.-grown pears continue to be merchandised & promoted at retailers across the country. Pear shippers have plenty of inventory of high-quality winter pears: Bosc, Green D 'Anjou & Red D 'Anjou. While the Bartlett crop from the Northwest took a bit longer to move than in a typical year, the Anjou crop will be lingering while off shore imports begin to arrive. Some shippers expect to have crop available for a few more months.

## Peppers, Bell



QUALITY  SUPPLY 

**Green pepper** market has cooled off some and there seems to be more availability around as CA is also starting to harvest. Some quality issues in the South Florida peppers in terms of misshaped, suntan, & sizing. Expect quality to start being a factor as the heat in Florida starts to stress the plants. Keep in mind that peppers grown in Southern Florida & Immokalee area have the most age; the Plant City crops are a bit younger & quality should be better. Mexican fields are getting ready to wrap it up for the season. Georgia is schedule to start around mid-May. **Red and Yellow Peppers** - Prices are steady at high levels; stocks are tight. The Mexican season is ending early. We're receiving report that California production won't begin until mid-May.

## Peppers, Chili



QUALITY  SUPPLY 

The chili pepper supply has become a tight this week. More product should be available in time for Cinco de Mayo demand. Quality is best from northern **Mexico** growers, but product may have some quality challenges. In the **East**, Plant City's production hit a soft spot, but there is more product on the way & quality is nice. Georgia will also join in in 3-4 weeks.

# MARKET OUTLOOK



## Pineapples



Pineapple markets are trending towards smaller sizes. We are expecting to see less 5's and more 7's and 8's for the next 2 months. Quality is very good right now, climate in Costa Rica has improve which is optimal for maintain good quality.



## Potatoes



The potato market remains stable this week. Seeing pretty steady demand across the board. There will be some Norkotah availability for another month before we see only Burbanks. The Burbanks remain a smaller profile, with limited availability on large cartons. Last suppliers digging into Burbank's this month. Big spuds around \$13-\$14, smaller stuff around \$8.



**MARKET ALERT**

## Squash



**Zucchini** squash remains plentiful in Nogales, Florida, & Georgia. Yellow squash is still extremely tight. Demand exceeds supply, as good quality of yellow squash remains scarce. Production started in Georgia but yields on yellow squash aren't keeping up with the zucchini. Volume from Georgia will gradually start increasing as more growers start harvesting. Florida will continue to produce their normal volume but short term. Expect yellow squash to remain scarce **Yellow Squash (Alerted)**– Please expect pro-rates.



## Strawberries



Santa Maria, Oxnard and Salinas/Watsonville **California** growing areas continue to see a marked increase in supplies, while Oxnard, California supplies are starting to taper off. The fruit this week is plentiful & gorgeous, and most shippers will have promotable volume for the Mother's Day holiday with a weaker market than we have seen in prior years.



## Tomatoes



The market is stable near the bottom & stocks are plentiful. Domestic supplies are shipping out of **Florida**. **Mexico** is the prime growing region at this time. Mainland Mexico's round tomato crops continue to provide an adequate amount of fruit to meet market needs despite the seasonal decline. Fruit is sizing down, but quality remains good. Roma farmers in West Mexico expect consistent volumes through the month of May. As the tariff negotiations come to an conclusion, growers are estimating an 17.5% price increase for product imported from Mexico. Everything is moving fast with negotiations in the final days before the agreement deadline. We expect more direction early next week.





# MARKET OUTLOOK

## MARKET ALERT

### Cabbage

**Red Cabbage (Alerted)** – Market continue to have very limited supplies. Quality is being reported as good. Expect escalated pricing on red cabbage & processed red cabbage. **Green Cabbage** - Good supplies this week. Growers are reporting good quality, expect markets to be steady for the next few weeks.

## No relief in sight for Brussels sprouts shortage

Brussels sprouts production in North America is undergoing the transition northward. However suppliers say this process is taking its time, with the new crop in Santa Maria coming in light and staying that way. Mexico is still supplying the majority of product to the market, but the season is starting to wind down now as summer approaches. This is fueling a shortage of Brussels sprouts in the market.

"The Mexico season has another month or so to go before Brussels sprouts transition entirely to California," noted Steve Bontadelli of Pfyffer Associates in Santa Cruz. "Some volume has been coming out of Santa Maria since late March, beginning of April so currently we have a bit of overlap. However, production in Santa Maria has been slow to get going and as a result, supplies are very light."

### Market has almost doubled in the last month

The tight supply situation has resulted in a very strong market. Prices are significantly higher than they were a month ago and there is no relief in sight as the Santa Maria crop continues its slow ramp up. The heavy rain in California earlier this year has been blamed for keeping a lid on volume and the effects could stretch well into summer.

"Demand has been exceeding supply for the past three to four weeks," Bontadelli said. "Prices have increased into the mid-\$40s, compared to last month when they were \$24. We don't expect to see a big jump in supply anytime soon. Heavy rain early this year resulted in a delay to the start of the California season and it's going to cause issues later in the summer too when the effects of planting gaps due to the heavy rains begin to appear."

### Well established product

Brussels sprouts as a category has been growing in the US, according to suppliers. Consumer interest in the product has been fueled by gourmet recipes and its use in restaurants as well as the trend towards healthier, easy-to-prepare meals. Bontadelli said there is now a plethora of options for Brussels sprouts packaging and preparation in the market, which is helping to drive demand.

"Brussels sprouts continue to ride the wave of popularity in the United States," he observed. "They are well established now in restaurants which is also helping to drive consumer demand. In the last few years, Brussels sprouts stalks have experienced big pulls during the Thanksgiving and Christmas periods. Supplies of stalks continue to increase in availability and are now for the most part, available year-round."

<https://www.freshplaza.com/article/9098254/no-relief-in-sight-for-brussels-sprouts-shortage/>

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](mailto: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 and our Midweek Update released every Wednesday. Have a great week!

Keeping You Informed,



Your Dedicated NPC, LLC Staff