

Market **OUTLOOK**

Week 4: January 22 - 28, 2024



Market **ALERT**

- Asparagus (*Extreme*)
- Beans: Green Beans & Snow Peas
- Berries: Raspberries & Strawberries
- Broccoli & Broccolini
- Carrots
- Cauliflowers
- Citrus: Limes & Oranges
- Corn
- Grapes
- Green Onions
- Herbs: Basil & Chervil
- Honeydew (Radar)
- Onions White (*Extreme*)
- Mushrooms
- Squashes
- Tomatillos
- Tomatoes (*Force Majeure*)

transportation

Nat'l Diesel Avg: \$3.863 **↑**

Last Year: \$3.107 **↓**

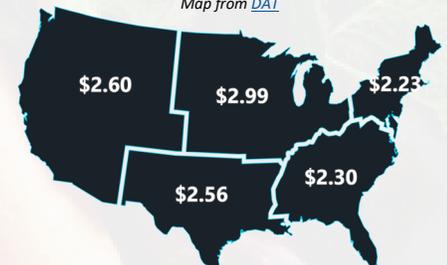
Nat'l Fuel Surcharge: \$0.48

Shortages: Freight rates is flat

- extreme - none
- slight - ID, OR & WA

National Posted Rate per mile

previous week's average outbound reefer rate for each region
Map from [DAT](#)



weather **OUTLOOK**

Oxnard, CA: Partly cloudy and rain with highs in the 60s and lows in the 50s.

Salinas, CA: Cloudy and rain with highs in the 60s and lows in the 40s with PM sun on Thursday and Friday.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 70s and lows in the low 50s with showers on Monday.

Immokalee, FL: Cloudy and showers with highs in the 80s and lows in the 60s.

Idaho Falls, ID: Cloudy and snow showers with highs in the 30s and lows in the 20s.



Market UPDATE

apples



The Washington State crop is showing good quality and supplies through Q1, with most varieties up in volume due to a small crop except for Galas. Peak sizes are trending toward foodservice sizes (125/138s) except Red Delicious, with lower volumes on 125s and smaller.

market prices. Cold and wet weather continue to have an impact on production in Florida, slowing down plant growth. Orders are being prorated, and market prices are escalating.

Snow peas: Guatemalan production is steady, with a lower yield due to weather. Quality is fair. Mexico has light supplies with an active market.

asparagus



EXTREME Mexico's weather has improved, with no cold fronts forecasted until the end of January, and product are expecting to increase crossing in Yuma. Peru will remain in play during transition but will continue closing fields as the Mexican season starts. High pricing trends are expected.

berries



Blackberries: Prices are down. Mexico has been impacted by cool weather and good quality, with an increase volume in the weeks to come.

Blueberries: Prices are down with light volume. Production is increasing in Oxnard and Mexico, while Chile is experiencing a mild temperature.

Raspberries: **ALERT** Prices are up, with Mexico's production impacted by cool weather, but quality continues to be good.

Strawberries: **ALERT** Prices are up with good to fair quality and light volume from Oxnard, Santa Maria, and Florida. Mexico is increasing but has been impacted by cool weather and rain.

avocados



The California Avocado Commission predicts a pre-season crop of 208 million lbs, 24 million lbs shy of last year's small crop of 232 million lbs. Fruit will trickle in January/February, with March projected at 2.5 million lbs per week, a volume increase in May, peaking in June, and a seasonal decline in August, with the season ending in early September. These are only projections, and they will be heavily influenced by what happens in Mexico, supply and demand, etc.

broccoli



Broccoli: Light supplies and good demands from Santa Maria, Yuma, and Mexico, while desert growers face lower yields due to freezing temperatures, causing limited supply and escalating market pricing for the next few weeks.

Brocolini: Supply has improved, with increased demand expected to continue in the coming weeks.

bananas



The disruptions in Guatemala are more under control and allowing trucks to pass, resulting in an improved supply chain and a return to its pace. There are no major issues at this time.

brussels sprouts



The market is experiencing steady supplies and good demand with fair quality. However, freezing temperatures have caused quality issues. Expect continued improvement in market pricing and steady supplies in the coming weeks.

beans



Green Beans: High demand is expected due to delayed harvest days and limited availability in Mexico and the West Coast, resulting in higher



Market UPDATE

cabbages



The market is more active due to the transition, with steady supplies and good quality from Oxnard and Yuma.

carrots



The growing region in Mexico is facing water and germination issues, causing crop losses and complicating the domestic market. California and other regions are also facing weather-related challenges, with a low supply of jumbos and cellos. Prorates may be expected, and table carrots may be a substitute. Tropical storm Hilary disrupted plantings, causing reduced yields. Hurricane Idalia's devastation in Georgia may impact January volume.

cauliflower



Light supplies from Santa Maria, Yuma, and Mexico are in good demand, while desert growers face lower yields due to freezing temperatures, causing limited supply and steady market pricing for the next few weeks.

celery



Supplies and market pricing from Oxnard and Santa Maria have improved, with fair quality. With Yuma in production, supply and market pricing are expected to improve in the next few weeks.

citrus



Limes: ALERT Regardless of availability, growers are hesitant to cut fruit in order to secure the best price. Rain has provided an advantage for fruit growth, with many big fruits finishing. However, the quality of small fruit has not been the best due to the rain and cold weather. More

oil spots will appear due to the rain. The market has been steady, with a high market for a few months.

Lemons: Production is strong in all sizes, with a smaller percentage of choice over fancy. Increase volumes in the coming weeks.

Oranges: ALERT In 2023, the California citrus region faced intense weather conditions, including excessive rain and sun, which led to a decline in small orange sizes. As the crop continues to develop, small sizes will become limited, and the remaining season and the upcoming Valencia season will be challenging. It is recommended to open specs or switch to Mandarins.

corn



Rain and cool weather have impacted Florida and Mexico production, leading to increased prices and tight supplies. Quality is typically fair this time of year, and the sizes are smaller than in the summer.

cucumbers



Prices are slightly up due to a shift in production from the east to Honduras. Mexico is challenged with cool weather, which will impact production for the next week or two.

grapes



Imports are not arriving smoothly, disrupting the supply and impacting the market for a few weeks. Chilean supply may provide relief, but overall quality remains good.

herbs



Basil: RADAR Rain continues to have an impact on supply and quality.



Market UPDATE

herbs cont...



Chervil: **RADAR** Weather in Ecuador has delayed production.

Cilantro: Supplies are slightly better, with fair quality and improved market pricing from Oxnard and Santa Maria. Expect supply and markets to improve in the coming weeks.

kale



Supply is steady, demand is good, and quality is good, with an expected steady supply for the next few weeks.

lettuce



Green & Red Leaf: Supplies are steady, but quality is only fair due to irregular sizing, small heads, fringe burn, and epidermal peel caused by early morning frosts and freezing temperatures. Steady supplies for the next few weeks.

Iceberg: The supply and market pricing are steady and quality is fair, with lighter weights and smaller heads. Freezing temperatures cause epidermal peel on head lettuce, delaying harvest schedules as growers wait for the frost to melt.

Romaine: Supply is expected to remain steady with fair quality, but early morning frost and freezing temperatures are causing quality issues like fringe burn, blistering, and early epidermal peel. Market pricing is expected to remain stable for a few weeks.

Tender Leaf: Supply is steady, with good demand and good to fair quality reported. Colder weather will result in lighter supplies. Steady market pricing and supplies are expected in the next few weeks. The transition to Yuma has not impacted supplies. The impact of early morning frost is expected to impact market pricing.

melons



Cantaloupe: Honduran production has increased, adding more 9/9Js to the market, but this is expected to be short-lived. February is expected to have steady weekly volumes. The main issue is sizing, with the majority coming in 9s and larger, leaving smaller fruit in limited positions. Quality from both countries remains strong, and the market is expected to hold in the mid- to upper teens for the next month.

Honeydew: **RADAR** Limited relief is expected over the next 3-4 weeks due to the limited availability from all growing regions. Sizing is mostly 5s and larger, with a few 6s and no 8s. Flexibility may be required during loading. Mexican production is experiencing a decline due to a transition from one region to another, affecting the overall situation for about two weeks. They are of good size, clean, and cut well, with brix levels mainly in the 12-14% range.

Watermelons: Supplies are good from Florida. Mexico and offshore have limited supplies.

mushrooms



Supplies are a little tight due to quality issues with raw ingredients in compost. Markets are expected to react to these limited supplies, leading to an escalated price.

onions



EXTREME (White) The quality is good in all growing regions, with steady demand. The market prices are increasing, especially on whites, which are nearly nonexistent, followed by medium red and large yellow. Recent ice storms and weather have caused loading and production delays. Imports aren't due to start until March. The freight rate has increased, and trucks are a little tight. Precut will be impacted.



Market UPDATE

onions green



Supply gaps due to holidays and reduced labor in Mexico have led to light supplies. Markets are expected to increase as demand exceeds supplies, and freezing temperatures have delayed crop maturity. Supply is expected to improve post-holidays as workers return to work.

pears



Bartlett quality has been marginal, with better quality expected in the next two months. Anjou quality is good, with supplies through July. Bosc quality is good, with size peaking at 120/135ct.

peppers bell



Prices are down with fair quality. Due to the recent rains in Florida and Mexico, supplies will be tight for the next couple of weeks.

peppers chili



ALERT (Tomatillos) Prices are down with a slight production increase and soft demands.

pineapples



The sugar content remained above 15 Brix, and the average firmness improved slightly. No vessel delays were reported, but loading delays are expected in all regions. Weather patterns remained similar, with a slight decrease in weekly precipitation and overcast days. This could lead to new natural flowering events.

potatoes



The market is flat, with good quality. Idaho has plenty of availability due to better yields, making it a good time to promote potatoes.

squash



Yellow and zucchini squash prices are up with fair to poor quality due to rain and cool weather in South Florida and Mexico, with supplies expected to increase in early February.

tomatoes



Prices are up due to cooler weather in Florida and Mexico, while growers anticipate warmer weather next week to boost production and stabilize markets.

commodities alert overview

Many growers are calling Force Majeure. Farming operations have been impacted by cold weather in Florida and Mexico. **Asparagus** is on extreme alert, with limited volume in all growing regions. **Raspberries and Strawberries** are up due to cooler weather. **Carrots** are short on jumbo and cello due to the weather and are expected to be short through February. **Green beans** are limited and have escalated due to the weather affecting the growing regions. **Tomatillos** remain tight due to the weather. Force Majeure on **Tomatoes** due to unfavorable weather conditions.



Market UPDATE

in the news...

USDA: Fresh market citrus production up, prices down in 2022-23 season

By **TOM KARST** January 19, 2024 | THE PACKER

In a recap summary of the 2022-23 U.S. season, the USDA reported that U.S. citrus fresh-market production was up over the previous season.

U.S. citrus production for the fresh market reached 3 million tons in 2022-23, up 10% from the previous season, with larger fresh-market crops of oranges (up 2%), grapefruit (up 5%), lemons (up 8%) and tangerines (up 29%).

The USDA said the citrus crop was valued at \$2.6 billion in 2022-23, down 13.5% from the 2021-22 season, or a decrease in real value of 16%, after adjusting for inflation, according to the report.

ORANGE VOLUME UP

The marketing year for oranges in the U.S. begins in November of the preceding year and lasts through October of the current year, the report said.

The harvest of navel and other early season and midseason varieties begins in the late fall and typically lasts through the early spring, while the valencia orange harvest begins in the spring and lasts into the fall months. Representing just under half of all U.S. citrus production for the fresh market, the fresh-market orange crop in 2022-23 increased from the previous season to 1.44 million tons due to larger navel orange and early season and midseason crops in California and



U.S. citrus volume was up and prices were down in 2022-23, a USDA report says. (Photo: Olena Rudo, Adobe Stock)

Texas, the report said.

With increased supply, grower prices for fresh oranges were lower than last season, the report said.

The average equivalent-on-tree price for a box of fresh oranges over the period spanning November to....

[Read full article HERE](#)

produce in **PEAK** *for January*

 <p>Bok Choy Broccoli Brussels Sprouts</p>	 <p>Collard Greens Grapefruit Kale</p>	 <p>Oranges Parsley Parsnips</p>
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If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to jhoppe@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 Powered by Foodbuy Staff