

# Market **OUTLOOK**

Week 2: January 8 - 14, 2024



**Market ALERT**

**Asparagus (Extreme)**

**Beans: Green Beans & Snow Peas**

**Berries: Blackberries, Blueberries, Raspberries & Strawberries**

**Broccoli**

**Carrots**

**Cauliflower**

**Celery**

**Herbs: Basil & Chervil**

**Melons (Radar): Cantaloupe & Honeydew**

**Peppers Bell: Red & Yellow**

**Peppers Chili: Poblano & Tomatillos**

**Mushrooms**

**Squashes**

**Tomatoes (Force Majeure)**

## transportation

**Nat'l Diesel Avg:** \$3.876↓

**Last Year:** \$3.169↓

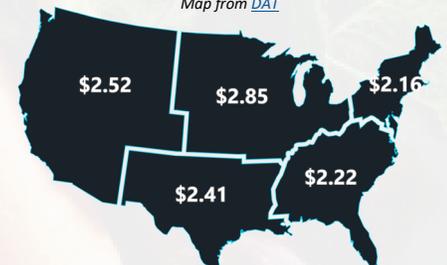
**Nat'l Fuel Surcharge:** \$0.51

**Shortages:** Freight rates is flat

- **extreme** - FL
- **slight** - AZ, CA, FL, 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 sunny skies with highs in the 60s and lows in the 40s.

**Salinas, CA:** Cloudy and shower with highs in the 50s and lows in the 40s and 30s.

**Yuma, AZ:** Partly cloudy and sunny skies with highs in the 60s and lows in the low 30s.

**Immokalee, FL:** Partly cloudy and thunderstorms with highs in the 70s to 80s and lows in the 60s.

**Idaho Falls, ID:** Cloudy and snow showers with highs in the 20s to single digit and lows in the upper teens to -9.



# 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.

## asparagus



**EXTREME** Cooler temperatures and seasonality have a significant impact on production in Mexico and Peru. Quality is fair in Trujillo, but larger sizes are extremely limited in all regions. Markets remain active, with limited production from all regions. Carborca is expected to start in the next couple of weeks, weather permitting.

## avocados



The size curve peaked on 60s but starts to show signs of availability on 40s and larger. Normal crop harvesting began, and dry matter is higher. Temperatures for storage and transit should be set at 41° and 40°, respectively. With Super Bowl approaching, the industry expects to harvest its highest volumes of 2024 in the next 4 weeks, totaling 300 Mil lbs. The size curve is projected to stay small, and bag Ads will be plentiful. Balancing supply and demand is crucial for market stability, as size curve continues to shift, more movement on larger fruits is needed.

## 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.

## beans



**Green Beans:** Supplies are limited with a strong escalating market. The weather has had a major impact on production, availability, and quality in Mexico and Florida. The supply from Caborca is likely to begin within the next three to four weeks, offering some relief if weather conditions are favorable.

**Snow peas:** Guatemalan production has slowed down due to last week's frost, limited holiday harvesting, and packing hours.

## berries



**Blackberries:** Prices are up due to production primarily from Mexico, which has been impacted by cool weather and good quality being reported.

**Blueberries:** Prices are up, with production from Oxnard, Chile, and Peru. Peru is ending, Chile is expected to peak during the next 3 weeks, while Oxnard is expected to increase.

**Raspberries:** Prices are up, with production primarily from Mexico. Cool weather has affected volumes, with good quality.

**Strawberries:** Prices are up, with production from Oxnard, Santa Maria, Florida, and Mexico. Cool weather and rain have affected volume in Florida, while rain has impacted California and Mexico.

## broccoli



**Broccoli:** Supplies are steady, with good demand from Santa Maria, Yuma, and Mexico. Expect supply to be steady in the next few weeks and market pricing to remain the same.

**Brocolini:** **ALERT** Supply has improved, demand has increased, and it is expected to continue improving in the coming weeks. Quality is expected to improve, and markets should see better availability.



# Market UPDATE

## brussels sprouts



The supply and quality have improved, and demand is good with improved market pricing. Improvements are expected for both supplies and pricing in the coming weeks.

## cabbages



Steady supplies and availability, with active market pricing due to the transition, and quality are good 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



Demand is good, with supplies coming from Santa Maria, Yuma, and Mexico. Markets and supplies are expected to continue improving.

## celery



Supplies from Oxnard and Santa Maria have improved, with market pricing increasing due to fair quality. Yuma is starting, which will help improve the price and supply.

## citrus



**Limes:** The market tightened post-holidays, with a limited harvest and fair quality and shelf life.

Small fruit sizes are heavier, with large fruit limited until Q2.

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

**Oranges:** Rainy weather in California has impacted the harvest, with Navels packing strong with great color and 12–13% brix, peaking in larger sizes, and 88 & 113 fancy tightening up for foodservice.

## corn



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

## cucumbers



Prices are slightly lower due to a shift in production from the east to Honduras and an increase in production from Mexico to Sinaloa.

## grapes



Peru's rainy weather has caused minor grape quality issues, but these are not major issues due to inconsistent weather patterns.

## herbs



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

**Chervil:** **RADAR** Production remains good but USDA holds is impacting quality.

**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.



# Market UPDATE

## kale



Supplies are steady with good quality and demand and are expected to remain steady for the next few weeks.

## lettuce



**Green & Red Leaf:** Supply is steady and of fair quality, but irregular sizing, light fringe burn, and early morning frost are causing quality issues. Expect steady supplies and a stable market.

**Iceberg:** The supply and quality are good, with lighter weights and smaller heads. Yields have improved, and market pricing is expected to improve. The impact of early morning frost is expected to impact market pricing, but supply is expected to remain steady for a few weeks.

**Romaine:** Supplies are good, with fair quality. Romaine Hearts is experiencing some light cupping, and carton weights are fair. Market pricing is expected to be steady as the transition to Yuma is completed. The impact of early morning frost is expected.

**Tender Leaf:** Supply is steady, with good demand and good to fair quality. 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:** **RADAR** Heavy October rains in Honduras have led to short availability of acreage and a higher market price. Production is currently 9/9Js, with some 12s expected. Sizing is expected to shift to more normal by next week. New growing area quality shows positive external and internal characteristics, with a slightly higher shell color and 12-14% brix. Flexibility in sizing will be necessary.

**Honeydew:** **RADAR** Honeydew production is expected to be challenging for the next 3-4 weeks due to Honduras' early season issues. North America is focusing on offshore, but there's only enough to cover contract commitments, leaving the open market in a tough position with higher pricing. Guatemalan sizing is projected to be over 90% 5ct and larger, putting pressure on smaller sizing for the next two weeks. Quality on dews has been fair to good, but new growing regions in Guatemala may provide better consistency. Flexibility of sizing may be necessary.

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

## mushrooms



Supplies are expected to be tight for 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.

## onions



The quality is good to excellent in all growing regions, with strong demand. The market is up, especially on white. Medium red and white are tight. This will impact the precut.

## onions green



Supply is light and of fair quality due to holidays and reduced labor in Mexico. Markets are expected to increase as demand exceeds supplies. Productions are expected to improve when harvesters return from the holidays.

## pears



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



# Market UPDATE

## peppers bell



**ALERT (Red & Yellow)** Green, red, and yellow bell pepper prices are up due to production disruptions from the holidays, as well as recent rains in Florida, with growers expecting volumes to climb in the coming weeks.

## peppers chili



**ALERT (Poblano & Tomatillos)** Prices have increased due to the holidays, with Florida production transitioning to the South. Rain and cool weather have reduced volumes, while hurricanes earlier in the season continue to impact Mexico's production. Growers anticipate higher supplies in the coming weeks.

## pineapples



The quality is good and is gradually shifting to a larger size. While availability remains stable, demand is high due to the upcoming holidays.

## potatoes



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

## squash



Yellow squash prices are slightly lower, while zucchini prices are higher as a result of weather events in South Florida and Mexico, with supplies expected to increase by mid-January.

## tomatoes



**FORCE MAJEURE** Tomato prices remain high, with 20 lb round, 25 lb round, and grape tomatoes trending down, cherry tomatoes up, and Roma mixed. Production is impacted by Christmas and New Year's holidays, and Florida has experienced rain. Production from Culiacan, Mexico, is increasing, which may alleviate market pressure in the coming weeks.

## commodities alert overview

**Asparagus** is on extreme alert, with limited volume in all growing regions. **Blackberries, Blueberries, Raspberries, and Strawberries** are up due to cooler weather. **Broccoli** supplies are limited for a few weeks due to brown beads and flowering defects impacting the yield. **Carrots** are short on jumbo and cello due to the weather and are expected to be short through February. **Chili peppers** remain tight due to the weather, especially on poblano and tomatillos. **Green beans** are limited and have escalated due to the weather affecting the growing regions. **Mushrooms** are tight for the holiday. Force Majeure on **Tomatoes** due to unfavorable weather conditions and extremely limited supply in Mexico.



# Market UPDATE

*in the news...*

## Agronometrics in Charts: A look at the U.S. table grape market

January 4, 2024 | FreshFruitPortal.com



*In this installment of the 'Agronometrics In Charts' series, Sarah Ilyas studies the state of the grape market in the US. Each week the series looks at a different horticultural commodity, focusing on a specific origin or topic visualizing the market factors that are driving change.*

The USDA recently released its Fresh Apples, Grapes, and Pears: World Markets and Trade report. The report highlights the drought in the Panama Canal watershed which has reduced freshwater levels, impacting shipping volumes.

October 2023 marked the lowest rainfall since 1950, making it the second-driest year. The Panama Canal Authority has reduced transit capacity, increasing vessel wait times. This affects East Coast shipments, notably for table grapes from Peru and Chile.

On average, the United States imports nearly 270,000 tons of table grapes from Chile, with 75% of shipments entering the United States via East

Coast ports.

For Peru, East Coast ports are even more critical at 85% and averaging 230,000 tons. The Port of Philadelphia is the top port of destination for both countries, accounting for over 90% of their East Coast shipments.

Almost all of Mexico's shipments enter the United States overland through Arizona and Texas.

Canal disruptions may lead shippers to explore alternative routes, potentially affecting transit time and fruit quality. U.S. table grape imports for 2023-24 are forecast to rise slightly to 760,000 tons, assuming...

[Read full article HERE](#)

*produce in* **PEAK** *for January*

Bok Choy	Collard Greens	Oranges
Broccoli	Grapefruit	Parsley
Brussels Sprouts	Kale	Parsnips

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](mailto: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