



WEEK 46: November 13 - November 19, 2023

MARKET OUTLOOK

Transportation:

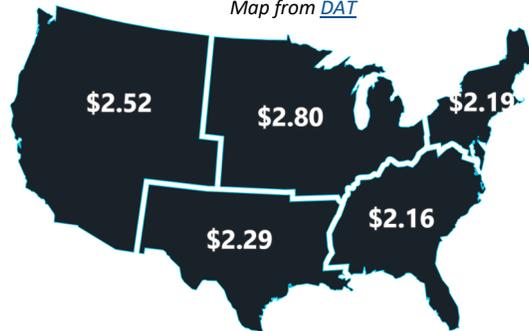
National Diesel Average: \$4.454

Compared to Last Year: \$3.591

National Fuel Surcharge: \$0.60

Shortages: Seeing steady freight rates, with **extreme** shortages - None; **slight** shortages - None

National Posted Rate per mile
previous week's average outbound reefer rate for each region
Map from [DAT](#)



Regional Weather Update:

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

Salinas, CA: Partly cloudy, rain and showers with highs in the 60s and lows in the 40s and 50s.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 80s and 70s and lows in the low 50s and 60s with AM showers on Thursday.

Immokalee, FL: Partly cloudy and thunderstorms with highs in the 80s and lows in the 60s with showers on Wednesday.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 50s and 40s and lows in the 30s.

MARKET ALERT

Asparagus

Beans: Snow Peas

Berries: Blackberries,

Blueberries (Force

Majeure) &

Strawberries

Broccolini

Brussels Sprouts

Carrots

Cauliflower

Corn

Iceberg

Mushrooms

Pepper Chili

Tomatoes



MARKET OUTLOOK

Apples



SUPPLY

GOOD

QUALITY

GOOD

The Washington State Apple Crop is experiencing strong growth and good supply, with an estimated 2023 crop of 134 million boxes, compared to 110 million this past season. The size profile benefits the foodservice industry, with a peak of 100/113ct and more 125s than 88ct. All varieties, from Red Delicious to Cosmic, have seen substantial gains, resulting in better value and availability throughout the season. Summer 2024 won't bring Granny Smith's prices to Washington like they did recently. The growing conditions have been ideal, and no weather issues have been reported.

MARKET ALERT

Asparagus



SUPPLY

FAIR

QUALITY

GOOD

Asparagus production in southern Baja is steady, with higher elevations in the Sonora desert opening. Because of El Nio, Peru is now at about 60% of their normal volume for this season. The volume is expected to increase next week. Markets are less active, with more volume coming from Mexico and Peru.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

Mexico is the primary source of avocados in the US, with over 99% of its volume coming from the country. Harvests in Mexico are strong, with hopes for improvement in size curves. Small fruit (60s and smaller) made up about 50% of the pack out, but moving into higher elevations and harvesting new acreage is providing more volume in 48s and a bit of an increase in 40s and larger. USDA has not reported on 32/36s due to light volume. Dry matter is 26%-28%, with eating and ripening quality improving each week. Q4 is a great time to promote Mexican avocados, especially small fruit and bagged small fruit.

Bananas



SUPPLY

GOOD

QUALITY

GOOD

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.

MARKET ALERT

Beans



SUPPLY

FAIR

QUALITY

FAIR

Green Beans: Production has improved. Georgia experienced a severe freeze, leading to a complete loss of crops. Florida harvesting was delayed by a week due to the cold temperatures. Mexico's green bean production, availability, and quality have been significantly impacted by rain and hurricanes. Market is escalated.

Snow Peas: **ALERT** Markets are active, but the supply is light. Mexico has only started with small amounts, while the domestic market is gapping. Guatemalan production and quality are good but not great.

MARKET OUTLOOK

MARKET ALERT

Berries



SUPPLY

BAD

QUALITY

FAIR

Blackberries: **ALERT** Prices for Blackberries are trending up slightly. Supplies remain tight due to weather related challenges. Quality is being reported as fair out of California and Mexico.

Blueberries: **FORCE MAJEURE** Prices for Blueberries are trending slightly down. Volume remains limited. Supplies are expected to remain tight through December. All growing areas has been impacted by rain and wind associated with recent Hurricanes.

Raspberries: Prices for Raspberries are trending down with good quality. Supplies are tight but steady. The market could tighten up a bit next week due to expected rains in California.

MARKET ALERT

Broccoli



SUPPLY

FAIR

QUALITY

FAIR

Broccoli: Supplies are light with strong demand. Supplies are available from Santa Maria, Yuma, and Mexico. Growers are reporting lower yields. Market pricing is active, and supplies should be light in the next few weeks. Prices will be escalated. (F.O.B. pricing for this week \$22.00 - \$23.00)

Brocolini: **ALERT** Supplies continue to be light. Demand has increased. Supplies are expected to be limited for a few weeks. Growers are reporting brown head and flowering defects. Yields are affected by quality issues. Market pricing continues to be escalated. (F.O.B. pricing for this week \$24.55 - \$24.75)

MARKET ALERT

Brussels Sprouts



SUPPLY

FAIR

QUALITY

FAIR

Supplies are starting to show signs of improvement. Quality is reported as improved. Demand is strong. Market pricing seems to be improving. Market pricing also seems to show signs of improvements. (F.O.B. pricing for this week \$32.00 - \$34.00)

Cabbages



SUPPLY

GOOD

QUALITY

GOOD

Supplies are steady with good quality. Growers are reporting better availability. Market pricing has improved. Products are coming from Oxnard and Santa Maria. (F.O.B. pricing for this week \$15.00 - \$17.00)

Cantaloupes



SUPPLY

GOOD

QUALITY

GOOD

The Yuma program will be done. Guatemalan cantaloupes arrived in Florida with excellent internal quality, brix levels in the 13-17% range, and an excellent flavor profile, despite having a greener caste, which is normal for this time of year. Most sizes are 9s and larger, with a few 12s.

MARKET OUTLOOK

MARKET ALERT

Carrots



SUPPLY
FAIR
QUALITY
GOOD

Mexico's carrot region is facing challenges due to water and germination issues, causing crop losses and further complicating the domestic market. California and other regions are also facing weather-related challenges, with jumbos and cellos in low supply. Prorates may be expected, and table carrots may be a good substitute. Tropical storm Hilary disrupted plantings in Imperial Valley, Riverside County, and Kern County, causing a week delay in planting and reduced yields. Hurricane Idalia's devastation in Georgia has significantly affected carrot farms, potentially impacting January volume.

MARKET ALERT

Cauliflower



SUPPLY
FAIR
QUALITY
FAIR

Supplies are light with strong demand. Supplies are available from Santa Maria, Yuma, and Mexico. Growers are reporting lower yield. Market pricing has escalated. Supplies will be light for the next few weeks due to the transition. (F.O.B. pricing for this week \$20.00 - \$21.00)

MARKET ALERT

Celery



SUPPLY
FAIR
QUALITY
FAIR

Supplies are light. Quality is fair. Supplies are currently coming from Salinas and Santa Maria. Market pricing has escalated. Supplies will be light for the next few weeks as the Salinas crop is winding down. Prices will be escalated for a few weeks until Oxnard starts. (F.O.B. pricing for this week \$22.00 - \$44.00)

Citrus



SUPPLY
FAIR
QUALITY
FAIR

Limes: The market is approaching stability due to a slow decline in pricing and holiday demand. Volume has increased, and quality/shelf life is improving. Peak sizing consists of small fruit, with large fruit limited until Q2 2024. Supply is expected to remain abundant through November, then decrease in December.

Lemons: Fruit has started in District 3 (Desert region), with loading in Yuma and Mecca. Supplies are limited and will remain tight until early November. District 1 (Central Valley) will begin operations in mid-November. Because of Mexico's limited availability and 75% choice yield, prices will remain high.

Oranges: Navels are expected to begin the second week of November if the fruit meets the required Acid to Brix ratios. Production of packable fruit is slightly down by 5% from last season, with more Choice than Fancy. The late Navel crop is expected to be light industry wide.

MARKET OUTLOOK

MARKET ALERT

Corn



SUPPLY

FAIR

QUALITY

FAIR

Prices for Corn are trending down while prices remain elevated. Production is coming out of Georgia. Florida is just getting started. The market is expected to come off a bit as Florida ramps up production in the coming week.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Slicing Cucumbers are trending down. Production is coming out of Georgia, Florida, and Mexico. Growers are expecting volumes to trend up over the next couple 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

FAIR

QUALITY

GOOD

California red seedless grape volumes are declining, but they will be present until November. Green seedless grapes will be available until early December. Peru is shipping and increasing volumes as California's supply decline.

MARKET OUTLOOK

Herbs



SUPPLY
GOOD
QUALITY
GOOD

The quality of herbs has improved with better weather conditions, and both domestic and imported **Chervil** production continues improving in the east, but inconsistent supply on the west coast remains due to weather-related issues.

Cilantro: Supplies are slightly better with fair quality. Market pricing has improved. Supplies are shipping out of Oxnard and Santa Maria. Growers are expecting supplies and markets to improve in the next few weeks. (F.O.B. pricing for this week \$15.00 - \$17.00)

Honeydews



SUPPLY
FAIR
QUALITY
GOOD

Guatemalan honeydews are often smaller, mid-sized fruits with 6s and 8s at this time of year.

MARKET ALERT

Iceberg



SUPPLY
FAIR
QUALITY
FAIR

Supplies are light. Quality is fair. Weights are expected to be on the lighter side with smaller lettuce heads. Yields will be light as growers transition to Yuma. Huron is wrapping up. The market is active due to the transition and the holiday coming up. (F.O.B. pricing for this week \$22.00 - \$24.00)

Kale



SUPPLY
GOOD
QUALITY
GOOD

Supplies are steady with good quality and demand. Supplies should remain steady for a few weeks. Market pricing is steady. (F.O.B. pricing for this week \$11.65 - \$13.65)

Leaf



SUPPLY
GOOD
QUALITY
GOOD

Green & Red Leaf: Supplies are light. Quality is fair with irregular sizing, light fringe burn, and some seeder. Markets are expected to be active the next few weeks. Growers are starting the transition from Salinas to Yuma. Light supplies are expected for the next few weeks with some increased markets. (Green Leaf F.O.B. pricing for this week \$13.00 - \$14.00)(Red Leaf F.O.B. pricing for this week \$14.00 - \$15.00)

Romaine: Supplies are light with fair quality. Romaine Hearts is experiencing some light cupping. Carton weights are fair. Expect market pricing to be active and light supplies due to the transition to Yuma and the holiday. (Romaine F.O.B. pricing for this week \$13.00 - \$15.00)(Hearts F.O.B. pricing for this week \$17.00 - \$19.00)

Tender Leaf: Supplies are steady with good demand. Quality is good to fair. Supplies and availability are improving due to better weather. Steady market pricing and supplies are to be expected in the next few weeks. (F.O.B. pricing for this week \$4.75 - \$5.00)

MARKET OUTLOOK



<p>MARKET ALERT</p> <p>Mushrooms</p> 	<p><u>SUPPLY</u> FAIR</p> <p><u>QUALITY</u> FAIR</p>	<p>Mushroom supplies are expected to be limited for the next few weeks going into 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.</p>
<p>Onions</p> 	<p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>Quality is good to excellent in all growing regions with steady demand. The market is steady. All colors and sizes are shipping out of the Northwest. Colorado has all colors and sizes available. This will also have an impact on precut.</p>
<p>Onions Green</p> 	<p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>Supplies have improved. Current supplies are coming from Mexico. Markets will not be escalated. Expect good quality for the next few weeks. Supplies and quality will improve in the next few weeks. (F.O.B. pricing for this week \$12.00 - \$14.00)</p>
<p>Pears</p> 	<p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>The Pear crop is expected to be of excellent quality, like the Apple Crop. Bartlett Crop is projected to have the same amount as last season, while Bosc is expected to have a larger crop, making prices on 100s and smaller better. Red Pears are expected to peak on 80/90ct, while Anjou's in the Pacific Northwest is down by 20%. Overall, the quality is good with size a profile 80/90/100ct.</p>
<p>Peppers Bell</p> 	<p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>Prices for Green and Red bell peppers are trending down while Yellow bell peppers are trending up. Production is coming out of California, Florida, Georgia, and Mexico.</p>
<p>MARKET ALERT</p> <p>Peppers Chili</p> 	<p><u>SUPPLY</u> POOR</p> <p><u>QUALITY</u> POOR</p>	<p>Chili Pepper prices are trending up, with no significant market changes. Production is coming out of California, Georgia, and Mexico. Production in all areas has been impacted by hurricane activity and recent rains.</p>

MARKET OUTLOOK

Pineapples



SUPPLY

GOOD

QUALITY

GOOD

The pineapple volume is strong, with the size curve starting to shift back towards larger size fruit. Please contact your local DC to inquire about any pineapple promos.

Potatoes



SUPPLY

GOOD

QUALITY

GOOD

Good quality from all growing regions. The market continues to trend down. Because of improved yields and increased acreage, Idaho is expected to have abundant Russet potato supplies this year. Good time to promote potatoes. This will also affect precut.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow and Zucchini Squash are trending down. Production is coming out of Georgia, Florida, and Mexico. Growers are expecting volumes to trend up over the next couple weeks.

MARKET ALERT

Strawberries



SUPPLY

POOR

QUALITY

FAIR

Prices for Strawberries are trending up. Production is coming out of Oxnard, Salinas, Santa Maria, Watsonville, and Mexico. Florida will start harvesting late this month. Because of the cold weather in California, supplies are tight. With rain forecast for most of California next week, the market is expected to remain tight.

MARKET ALERT

Tomatoes



SUPPLY

POOR

QUALITY

FAIR

Prices for 20 lb, 25 lb Round & Grape tomatoes are mostly trending up while Cherry and Roma tomatoes are slightly down. Most if not all local programs are done for the season. Production is coming out of California, Florida, Georgia, and Mexico. South Florida is just starting to harvest.

Watermelons



SUPPLY

GOOD

QUALITY

GOOD

Watermelons are in good supply on seedless and minis, with limited supplies in Florida. Mexico volumes are crossing in Texas and Nogales. The market is slightly trending down.



MARKET OUTLOOK

Produce Category Overview

The annual transition from Salinas to Yuma has started, which will have an impact on all Green Leaf, Iceberg Lettuce, Romaine Lettuce, Romaine Hearts, Processed Salads, and Baby Tender Leaf items such as Spring Mix, Baby Arugula, and Baby Spinach. Expect to see several challenges this month.

Asparagus are limited in all growing regions but expected to improve in 2-3 weeks. **Blackberries** are escalated with tight supplies due to the weather. **Blueberries (FORCE MAJEURE)** prices are escalated with limited supplies expected to last through late December. **Carrots** are short on jumbo and cello due to weather. **Chili Peppers** remain tight due to the weather. **Limes** market is escalated, particularly on large fruit. **Mushrooms** are beginning to get tight leading into the holiday. **Strawberries** are tight due to the cold weather in California. **Broccoli, Cauliflowers, Celery, Iceberg lettuce, Green & Red Leaf, and Romaine** will be light on supplies for the next few weeks due to the transition. Great time to promote **Potatoes**.

HOW ARE SHOPPERS PLANNING THEIR GROCERY SPENDING THIS HOLIDAY SEASON?

November 10, 2023 by Abasto

Despite ongoing concerns about high prices, shoppers are optimistic about their financial situations heading into the holidays. According to FMI—The Food Industry Association’s new U.S. Grocery Shopper Trends, Holiday Season report, they are finding ways to feed their families and meet their needs at the grocery store.

Cooking at home continues to be a key tactic shoppers use to manage their expenses, with 31% saying they are preparing meals at home more often and more than half planning to cook and eat more of their meals at home in the coming year.

Alternatively, the report found that 60% of shoppers say they are eating out less, and just 14% say they plan to dine out more in 2024.

“While consumers are understandably concerned about their finances amidst continued inflation heading into the holidays, shoppers are proving to be just as resilient when it comes to preparing for their holiday meal celebrations,” said FMI President and CEO Leslie G. Sarasin. “From looking for deals, shopping around at different stores and cooking more meals at home, shoppers remain excited for the holidays despite planning to ‘make do with less’ this year.”

RELATED ARTICLE: WHAT MOTIVATES CONSUMERS TO BUY MORE PRIVATE-LABEL PRODUCTS?

According to the holiday season report, 20% of shoppers say they are buying more groceries to contain their food spending, which helps explain why the average weekly grocery spend per household is currently \$155/week. While that is higher than the \$148/week shoppers spent last October, it decreases from the \$164/week from February of this year.

“Interestingly, while shoppers tell us they are saving money by going out to eat less, they are also taking advantage of expanded foodservice options at their local grocer. Shoppers are increasingly enjoying ‘hybrid’ meals that pair food made at home alongside semi- or fully-prepared items from the grocery store. This hybrid approach can offer shoppers tremendous value during this hectic season by offering convenience and affordability for any holiday meal celebration.”

Most shoppers (over 80%) are excited about the holidays this year, with 18% of consumers planning a celebration with more people than usual for...

[Read full article **HERE**](#)



MARKET OUTLOOK

Fall Transition Schedule | 2023 Yuma Season

Grower/Shipper	Current Location	Transitioning	Commodity	Transition Dates	CITY	Transition Dates	CITY
Bengard Ranches	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Yuma, AZ	Cauliflower			11/27/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Huron, CA	Lettuce Iceberg	10/16/23	HURON, CA	11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Lettuce Green Leaf/Red Leaf	10/9/23	OXNARD, CA	11/13/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Lettuce Romaine	10/4/23	OXNARD, CA	11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Celery	11/27/23	OXNARD, CA	11/27 - 6/10/24	OXNARD, CA
Church Brothers	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/21/23	YUMA, AZ
Church Brothers	Salinas, CA	Yuma, AZ	Cauliflower			11/21/23	YUMA, AZ
Church Brothers	Salinas, CA	Huron, CA	Lettuce Iceberg	10/20/23	HURON, CA	11/4/23	YUMA, AZ
Church Brothers	Salinas, CA	Yuma, AZ	Lettuce Green Leaf / Red Leaf			11/15/23	YUMA, AZ
Church Brothers	Salinas, CA	Huron, CA	Lettuce Romaine	10/12/23	HURON, CA	11/8/23	YUMA, AZ
Church Brothers	Salinas, CA	Oxnard, CA	Celery			11/6/23	OXNARD, CA
Church Brothers	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Broccoli Crowns			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Cauliflower			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Iceberg			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Green Leaf / Red Leaf			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Romaine			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
Green Gate Fresh	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/27/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Yuma, AZ	Cauliflower			11/27/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Iceberg	10/16/23	HURON, CA	11/19/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Green Leaf / Red Leaf	10/9/23	HURON, CA	11/17/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Romaine	10/5/23	HURON, CA	11/17/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Oxnard, CA	Celery	11/27/23	OXNARD, CA	11/27 - 6/10/24	OXNARD, CA
Taylor Farms - CA	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
The Salad Farm	Hollister, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ

Have you ever wondered what happens during a transition? Click on the video link below to see all of the actions.

Taylor Farms [Video](#)

Church Brothers [Video](#)

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 Powered by Foodbuy Staff

