



**WEEK 50: December 11 - December 17, 2023**

# MARKET OUTLOOK

## Transportation:

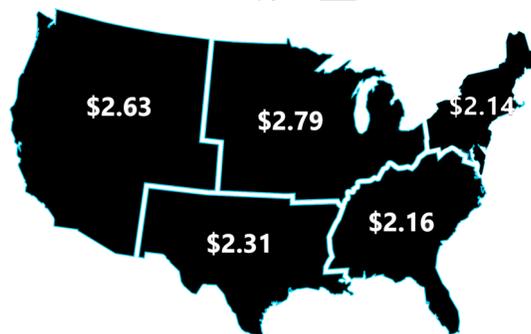
**National Diesel Average:** \$4.092

**Compared to Last Year:** \$3.217

**National Fuel Surcharge:** \$0.60

**Shortages:** Seeing steady freight rates, with **extreme** shortages - WA; **slight** shortages - ID & OR

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



## Regional Weather Update:

**Oxnard, CA:** Cloudy and sunny skies with highs in the 60s and lows in the 50s with showers on Saturday and Sunday.

**Salinas, CA:** Partly cloudy and shower with highs in the upper 60s and lows in the 40s.

**Yuma, AZ:** Partly cloudy and sunny skies with highs in the 70s and lows in the low 40s.

**Immokalee, FL:** Partly cloudy, showers, and thunderstorms with highs in the 70s and lows in the 50s and 60s.

**Idaho Falls, ID:** Partly cloudy and sunny skies with highs in the 30s and lows in the teens with AM snow showers on Monday.

## MARKET ALERT

**Asparagus**

**Beans: Green Beans & Snow Peas**

**Berries: Blueberries, Raspberries & Strawberries**

**Broccolini**

**Carrots**

**Melons: Cantaloupes & Honeydews**

**Mushrooms**

**Pepper Chili**

**Squashes**

**Tomatoes: Grape & Roma**

# 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  
LIMITED  
QUALITY  
GOOD

Asparagus production in southern Baja is decreasing due to seasonality and cooler temperatures, while larger sizes are limited in all regions. Peruvian production has also dropped due to field transition from southern to northern growing regions, with markets being highly active. Mexico supply is tight due to weather and seasonality, with markets experiencing double-digit increases in a week. Supply is expected to be limited until the Caborca region begins production in mid/late January, depending on the weather.

## Avocados



SUPPLY  
GOOD  
QUALITY  
GOOD

Avocado demand begins to increase and will continue through the Super Bowl. Coming out of a holiday week, standing inventories are a healthy 51.6 Mil pounds, and the size curve is showing signs of sizing up as larger sizes become available. Market conditions are expected to remain steady with minor price adjustments and good availability in the coming weeks.

## 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. No major issues at this time.

## **MARKET ALERT**

## Beans



SUPPLY  
FAIR  
QUALITY  
FAIR

**Green Beans:** The market has slowed down due to cold temperatures and rain in Florida, causing reduced yields and crop damage. Supplies are expected to be limited in the coming weeks, while Mexico faces limited availability due to rain and hurricanes. Expect the market to be escalated for the next couple of weeks.

**Snow Peas:** Guatemalan production and quality are improving, with markets experiencing increased supply and light supply. Domestic is gapping, and Mexico is starting with limited quantities.

# MARKET OUTLOOK

**MARKET ALERT**

**Berries**



SUPPLY

BAD

QUALITY

FAIR

**Blackberries:** Blackberry prices are decreasing with good to fair quality. Most of the production is coming from Mexico.

**Blueberries:** **ALERT** Blueberry prices are decreasing due to production from Chile, Mexico, and Peru, with growers anticipating a slight market tightening in the coming weeks.

**Raspberries:** **ALERT** Raspberries prices are increasing with good to fair quality. Most of the production is coming from Mexico.

**MARKET ALERT**

**Broccoli**



SUPPLY

FAIR

QUALITY

FAIR

**Broccoli:** Both supplies and demand are good from Santa Maria, Yuma, and Mexico, along with better yields. Market pricing is expected to remain stable in the coming weeks.

**Broccolini:** **ALERT** Due to increased demand, supplies are expected to be limited for a few weeks. Growers are reporting brown beads and flowering defects, impacting yield. Although improved supplies are expected in Yuma, the market may take a few weeks to catch up.

**Brussels Sprouts**



SUPPLY

FAIR

QUALITY

FAIR

Supplies and quality have improved, with good demand for Brussel Sprouts. Market pricing has also improved, with better availability and improved yields. Expect steady supplies and pricing in the coming weeks.

**Cabbages**



SUPPLY

GOOD

QUALITY

GOOD

Due to the transition, the market pricing is more active, with improved availability coming from Oxnard and Yuma. Supplies are expected to be steady and with good quality.

**Cantaloupes**



SUPPLY

GOOD

QUALITY

GOOD

**RADAR** The forecast predicts lower melon volumes in Guatemala due to poor pollination and low fruit sets from October rains and cooler November temperatures. Production in the Zacapa valley will continue until the middle cycle transitions to other regions. Cantaloupe arrivals peak on 9/12s and some 15s, with strong demand on 9/9Js. External quality improves as the season progresses, while internal quality remains strong, with brix levels ranging from 12-16%, largely dependent on size.



# 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.

**Cauliflower**



SUPPLY  
GOOD  
QUALITY  
GOOD

Cauliflower yields and availability have improved, with good demand from Santa Maria, Yuma, and Mexico. Supplies are expected to remain steady in the coming weeks, and market pricing is expected to improve.

**Celery**



SUPPLY  
GOOD  
QUALITY  
GOOD

Celery is available in Santa Maria and Oxnard, with steady supplies and good quality. Market pricing has improved since the transition to Oxnard, and supplies are expected to remain stable for the next few weeks.

**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 decrease in December.

**Lemons:** Fruit has started in District 3 (Desert region), with loading in Yuma and Mecca. 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

## Corn



### SUPPLY

GOOD

### QUALITY

FAIR

Corn prices are increasing due to the transition of East production to South Florida, which has been impacted by recent rainfall, while Western production is coming from California, and supplies remain tight.

## Cucumbers



### SUPPLY

GOOD

### QUALITY

GOOD

Slicing cucumber prices are decreasing. Central and South Florida are shipping, as they await Honduras' arrival in the market. Production out west is coming from Sinaloa and Baja production.

## 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

GOOD

### QUALITY

GOOD

Peruvian grape volumes are increasing, with availability primarily in large and extra-large sizes. Pricing remains steady but may increase once California is done. East Coast shipments are steady, while West Coast imports face challenges in December.



# MARKET OUTLOOK

## Herbs



SUPPLY

GOOD

QUALITY

GOOD

The quality of herbs has improved with better weather conditions on the east coast, but inconsistent supply on the west coast remains due to weather-related issues.

**Cilantro:** Growers report slightly improved supplies this week, with fair quality and improved market pricing. Supplies are shipping out of Oxnard and Santa Maria, with growers anticipating further improvements in the coming weeks.

## Honeydews



SUPPLY

GOOD

QUALITY

GOOD

**RADAR** Honeydew production in all ports has started picking up, but is expected to remain stagnant throughout the month. The market is expected to slightly increase as Mexican production decreases over the next 10-14 days. Guatemalan production is mostly 5/6s, with limited jumbo fruit.

## Iceberg



SUPPLY

GOOD

QUALITY

GOOD

The supplies are good, and quality has improved, with lighter weights and smaller heads. Yields have improved since transitioning to Yuma, and market pricing is expected to improve due to better yields and availability. Expect steady market pricing for a few weeks.

## Kale



SUPPLY

GOOD

QUALITY

GOOD

Supplies are steady with good quality and demand this week. Kale supplies and market pricing are expected to remain steady for the next few weeks.

## Leaf



SUPPLY

GOOD

QUALITY

GOOD

**Green & Red Leaf:** Supplies and quality have improved, with irregular sizing and light fringe burn due to strong winds. The market is stable since the transition to Yuma, and for the next few weeks, supply are expected to be steady.

**Romaine:** Supplies and carton weight are good with fair quality. Romaine Hearts is experiencing light cupping, but stable market prices and better supplies are expected since the transition to Yuma.

**Tender Leaf:** Supply is steady, with good demand and good to fair quality. Fair weather is expected to improve availability. Steady market pricing and supplies are expected in the next few weeks. Transition to Yuma has not impacted supplies.

# MARKET OUTLOOK

**MARKET ALERT**

**Mushrooms**



SUPPLY  
FAIR  
QUALITY  
FAIR

Mushroom supplies are expected to be tightened up 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**



SUPPLY  
GOOD  
QUALITY  
GOOD

The quality of products is good to excellent in all growing regions, with strong demand. Market pricing is trending up, with white being the biggest increase. Medium red and white are tight. The U.S. exporting to Mexico is causing an increase in the market. Freight is slightly up, with trucks getting tight. Orders should be placed early for the upcoming holiday. This will also have an impact on pre-cut.

**Onions Green**



SUPPLY  
GOOD  
QUALITY  
GOOD

Green onions supplies have improved with products coming from Mexico. Markets will not be escalating this week, and good quality is expected for the next few weeks.

**Pears**



SUPPLY  
GOOD  
QUALITY  
GOOD

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.

**Peppers Bell**



SUPPLY  
GOOD  
QUALITY  
GOOD

Green bell pepper prices are declining, while red and yellow pepper prices are increasing due to a hard freeze in Georgia, ending their season. Production has moved to Florida, and the red and yellow pepper market is currently tight due to cool weather in Georgia and Mexico.

**MARKET ALERT**

**Peppers Chili**



SUPPLY  
BAD  
QUALITY  
POOR

Chili prices are mixed, with Poblano prices being extremely high. Supplies are tight for all chili peppers, and Georgia just finished their season. Florida is in production, but there is insufficient volume to have an impact on the markets. Mexico production is impacted by cool weather.

# MARKET OUTLOOK

## Pineapples



SUPPLY  
GOOD  
QUALITY  
GOOD

Pineapples are showing good quality and are gradually moving into larger sizes curve. Pineapple availability is stable, but demand is higher due to upcoming holidays. Proactively plan with your local distribution center for the upcoming holidays.

## Potatoes



SUPPLY  
GOOD  
QUALITY  
GOOD

Good quality from all growing regions. The market is trending up slightly on the larger sizes while the smaller sizes remain stable. There's still plenty of availability in Idaho due to the better yield this season. Good time to promote potatoes. This will also affect precut.

## **MARKET ALERT**

## Squash



SUPPLY  
POOR  
QUALITY  
POOR

Yellow and Zucchini squash prices are increasing due to recent rains in Florida. Production out of the West is transitioning to Sinaloa, causing an extremely tight market and potential quality issues.

## **MARKET ALERT**

## Strawberries



SUPPLY  
POOR  
QUALITY  
FAIR

Strawberry prices are slightly down, with production from Oxnard, Santa Maria, Florida, and Mexico. Supplies remain tight.

## **MARKET ALERT**

## Tomatoes



SUPPLY  
POOR  
QUALITY  
POOR

**ALERT (Grape & Roma)** The Roma tomatoes market is tightening due to hurricane activity in Mexico, dry weather, and slowed growth cycles. Prices are increasing for next week, making it difficult to secure products. The market is expected to remain tight for 30 to 45 days, with supplies tight in the East due to production transitioning to South Florida. Gowers report good volumes on 20 lb and 25 lb Round tomatoes, making them an attractive substitute for Roma tomatoes due to their availability and pricing.

## Watermelons



SUPPLY  
FAIR  
QUALITY  
GOOD

Watermelons supply is tight due to Northern Mexico winding down, Southern Mexico starting in three to four weeks, and offshore is starting with limited supplies on the east coast. December is the most challenging month, with Florida starting in early January. The market is trending up.



# MARKET OUTLOOK

## **Produce Category Overview**

**Asparagus** are limited in all growing regions but expected to improve in 2-3 weeks. **Blueberries** prices are trending down but supplies are expected to tighten up again. **Carrots** are short on jumbo and cello due to weather. **Chili Peppers** remain tight due to the weather. **Green Beans** are limited and escalated due to the weather affecting the growing regions. **Mushrooms** are tight for the holiday. **Raspberries** are a little tight post-holiday. **Strawberries** are tight due to the cold weather in California. **Tomato Grape and Roma** are tight due to hurricane activities in Mexico. Great time to promote **Potatoes**.

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## **Jalisco avocado growers preparing for the Super Bowl amidst a “positive export season”**

By Sebastian Ramirez | [FreshFruitPortal.com](https://FreshFruitPortal.com) | December 01, 2023

During its second year of avocado exports to the U.S. Jalisco growers are satisfied with the results this season. So far, the Mexican state has exported 42,834 tons of avocados to the U.S., 45% of the total share of exports.

Exports have increased year-on-year and exporters expect that with the Super Bowl in February, they will nearly double the amount of total exports from 2022-23.

“We still have fruit to keep exporting this season to our markets, especially to the U.S. for the big event and for the Cinco de Mayo celebrations,” Eleazer Ocegüera, president of the Association of Exporting Producers of Avocados of Jalisco (APEAJAL) tells [FreshFruitPortal.com](https://FreshFruitPortal.com).

### **Preparations for the Super Bowl**

The main event for Mexican avocados in the U.S. is the Super Bowl, which is why growers in Jalisco are getting ready to offer a strong supply during that time.

“Our growers have strong and high-quality supply prepared for the Super Bowl and we want to make sure to do things right and we maintain the positive reputation of Mexican fruit,” says Ocegüera.

APEAJAL functions as a support for APEAM which is in charge of all promotion campaigns for Mexican avocados in the U.S. This joint work has helped grow the visibility and recognition of the fruit in America.

### **Lessons learned**

The main challenge for Jalisco growers has been to maintain the quality of exported fruit, which is why members of the industry have become very demanding in terms of the fruit that qualifies for exportation, according to Ocegüera.

“It has to be a good product that our consumers enjoy because that benefits the Mexican industry as a whole,” says Ocegüera.

The post-harvest work is critical in this sense because taking care of the fruit throughout the entire supply chain guarantees the quality of the product upon arrival.

### **American consumer demands**

American consumers are increasingly expecting better quality and bigger sizes for avocados, which is why...

[Read full article HERE](#)

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. Have a great week!

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