

Market **OUTLOOK**

Week 7: February 12—18, 2024



Market ALERT

- Arugula
- Basils
- Berries: Raspberries & Strawberries
- Broccolini
- Carrots
- Corn
- Grapes
- Green Beans
- Green Onions
- Mushrooms
- Onions White (*Extreme*)
- Oranges
- Peppers Bells
- Squashes
- Tomatoes

transportation

Nat'l Diesel Avg: \$3.899↑

Last Year: \$3.259↓

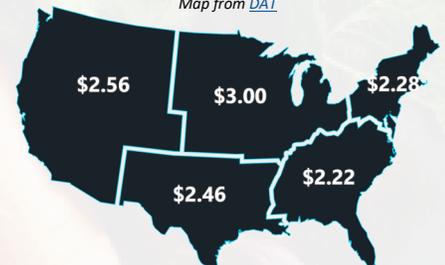
Nat'l Fuel Surcharge: \$0.48

Shortages: Freight rates is flat

- extreme - none
- slight - CO, FL & 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 showers with highs in the 60s and lows in the 40s.

Salinas, CA: Cloudy and showers with highs in the 60s and lows in the 40s.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 70s and lows in the low 40s to 50s.

Immokalee, FL: Cloudy, sunny, and showers with highs in the 70s and lows in the 50s.

Idaho Falls, ID: Cloudy, rain, and snow showers with highs in the 30s to 40s 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.

asparagus



Mexico has seen an improvement in supplies, with all sizes now available and market pricing leveling out.

avocados



Although the amount of avocado produced in Mexico has fallen short of weekly estimates, the country is still able to supply the Super Bowl market. Avocados comprise 7% of the top 10 fruit items and are still among the top 5 produce commodities in retail ads. Over the past three weeks, there has been a decrease in available orchards and daily field truck count, potentially leading to a decrease in weekly harvested volume from Mexico. Since some growers and packing houses observed Constitutional Day on Feb. 5th, harvest was limited. Ash Wednesday, which begins Lent, may impact US market pricing. California has begun harvesting with a light volume, estimated to be 208 mil lbs, with many fruit on the trees still small. Growers may wait until the fruit has sized up on the trees and ramp up harvest volumes during peak promotional periods to support retail ads on the West Coast.

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: **ALERT** Prices are slightly down with steady demand. Mexico's production has improved. Florida continues to be impacted by the cold and wet weather but is improving.

Snow peas: Guatemalan production is steady with fair quality and a decrease in pricing.

berries



Blackberries: Prices are down, with steady production from Mexico and of good quality.

Blueberries: Prices are down, production is light but expected to increase in Oxnard, Mexico has steady volume, and Chile is experiencing cool temperatures, tight supplies, and good quality.

Raspberries: **ALERT** Prices are up, with light supplies from Mexico, and quality continues to be good.

Strawberries: **ALERT** Prices are up due to significant rain in California, with Oxnard and Santa Maria assessing the damages from the rain, while Florida is impacted by cool weather. Supplies are tight in Mexico but are increasing.

broccoli



Broccoli: Supplies are steady with good demands from Santa Maria, Yuma, and Mexico. Expect supply and market pricing to be steady for the next few weeks.

Brocolini: **ALERT** Supplies are limited until early next week due to California's recent rains, and growers are unable to harvest as scheduled. They anticipate fields drying out soon, allowing them to resume normal harvest schedules. Market pricing is expected to increase. Demands continue to be good.



Market UPDATE

brussels sprouts



The supply situation is improving, with fair quality and good demand. Market pricing is improving, despite some quality issues caused by freezing temperatures. Expect the market and supplies to continue to improve.

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



Steady supplies with good demands from Santa Maria, Yuma, and Mexico. Supply and market pricing are expected to be steady for the next few weeks.

celery



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

citrus



Limes: The market increased slightly and is expected to continue due to favorable weather and increased middle-sized crops. Big fruit may become tighter, but the quality of the fruit is good, allowing it to hold.

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



Prices remain stable, with supplies being tight in the East and West. Quality is typically fair this time of year, and the sizes are smaller than in the summer.

cucumbers



Prices are down due to a shift in production from the East to Honduras, with hit-and-miss weekly volume. Production from Mexico, particularly from Sinaloa, is increasing in volume for the West, with daily increases.

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.



Market UPDATE

herbs



Basil: **RADAR** Cold weather has impacted supply and quality in Columbia and Mexico.

Cilantro: Supplies are light, with fair quality and improved market pricing from Oxnard and Santa Maria. Quality and supplies are impacted due to rain earlier in the week.

kale



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

lettuce



Arugula: **ALERT** Supplies are limited and good demand, but quality is only fair to poor due to past freezing temperatures. The daily harvest was impacted by recent rain. Better supplies are expected in the next week.

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 weather. Steady supplies for the next few weeks.

Iceberg: The supply and market pricing are steady, but the quality is fair, with lighter weights, smaller heads, and epidermal peel caused by freezing temperatures. Steady supplies and market pricing are expected for a few weeks.

Romaine: Supply is 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 be steady for the next few weeks.

Tender Leaf: The supply is light due to colder weather and recent rain, while demand is good and of good to fair quality. The transition to Yuma has not impacted supplies.

melons



Cantaloupe: The expected production decrease in February has not yet occurred due to increased supply from Honduras and decreased demand. Pricing has settled over the past week, and it is expected to remain this way for the next few weeks. Production will be lower until Zacapa production from Guatemala starts at the end of February. Guatemalan production has seen smaller sizes, but this trend is expected to shift higher by the end of this week. Recent arrivals have solid quality with good internal characteristics and a strong flavor profile with a brix level ranging from 12-15%.

Honeydew: Arrivals are a mix of sizes, with mostly 6/8s from Guatemala and larger fruit from Honduras. Quality is cleaner, with strong brix levels ranging from 12-14%.

Watermelons: The market is expected to remain strong, with high demand, excellent quality, and availability through March.

mushrooms



The cold weather is affecting yields, with growers reporting quality issues with compost ingredients. Supplies are expected to be limited in the next few weeks, causing prices to increase.

onions



EXTREME (White) The quality is good in all growing regions, with steady demand. The market prices are increasing, especially on whites. The white onions are extremely tight and non-existent, followed by medium red and large yellow. Some growers are done with whites for the season and will not have them available again until late April. Imports are expected to start in March. Imperial Valley is expected to start in mid-April. This will impact the precut.



Market UPDATE

onions green



Light supply, primarily from Mexico, rain, and cold temperatures have led the market to escalate, but it is expected to improve when the weather improves.

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 up with fair quality. Due to the recent rains in Florida and Mexico, supplies will continue to be tight for a few weeks.

peppers chili



Prices are mixed, but the weather in Mexico and Florida has improved, and growers are reporting good quality.

pineapples



The rainfall accumulated nearly 2", with a high sugar content and a high percentage of fruit with

a brix greater than 15.5, with low standard deviations in brix readings on all farms. The average fruit color remained similar to the previous week, but firmness was slightly lower.

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 down, with fair to poor quality. Supplies are extremely tight, with crops impacted by recent cool, wet weather in South Florida and Mexico. Supplies are expected to increase in early March.

tomatoes



Prices for tomatoes are decreasing, except for 25 lb round, grape, and cherry tomatoes, which are extremely high. 20 lb rounds and roma are currently great value. Florida and Mexico weather is improving, and production is picking up daily, with growers forecasting further price decreases.

commodities alert overview

Arugula are limited due to cool temperature and rain. **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 improving but still escalated. **Tomatoes** are improving and prices are starting to drop except for 25 lbs round, grape, and cherry.



Market UPDATE

in the news...

U.S. imports of Mexican tomatoes rise slightly in 2023

By **TOM KARST** | February 9, 2024 | THE PACKER

Imports of Mexican tomatoes through all U.S. ports totaled \$2.49 billion from January through November 2023, up 1% from calendar year 2022 imports of \$2.48 billion, up 5% from \$2.38 billion in 2020.

At the port of Nogales, Ariz., U.S. imports of Mexican tomatoes declined from \$756 million in 2020 to \$671 million in 2021. Imports through Nogales rebounded slightly to \$714 million through November 2023 after dipping in 2022. From 2020 through the first eleven months of 2023, U.S. imports of Mexican tomatoes through Nogales declined 5%, according to USDA statistics.

At the port of Laredo, Texas, U.S.

imports of Mexican tomatoes grew from \$619 million in 2020 to \$688 million in 2022 before dropping slightly to \$634 million through November 2023. From 2020 to the first eleven months of 2023, U.S. imports of fresh tomatoes through Laredo grew 2%, USDA statistics show.

U.S. tomato imports through Hidalgo, Texas, grew steadily from \$593 million in 2020 to peak at \$638 million through November 2023. From 2020 to the first 11 months of 2023, U.S. imports through Hidalgo grew 8%, according to the USDA.

U.S. imports of Mexican tomatoes crossing through Otay Mesa, Calif., grew from \$294 million in 2020 to peak



USDA statistics indicate a rise in the value of U.S. imports of Mexican tomatoes in 2023. (Photo: funkenzauber, Adobe Stock)

at \$337 million through November 2023 after a slight dip in 2022. From 2020 to the first 11 months of 2023, U.S. imports of Mexican tomatoes through Otay Mesa rose 15%, according to USDA statistics.

[Read full article HERE](#)

produce in **PEAK** *for February*

| | | |
|------------------|---------|----------|
| Apples | Cabbage | Oranges |
| Avocado | Kale | Parsnip |
| Brussels Sprouts | Kiwi | Potatoes |

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