

Market **OUTLOOK**

Week 12: March 18 - 24, 2024



Market ALERT

- Avocado
- Bell Peppers
- Broccoli
- Cucumbers
- Grapes
- Herbs
- Lettuce
- Onions White
(Extreme)
- Oranges
- Raspberries
- Squash Yellow
- Tomato Cherry

transportation

Nat'l Diesel Avg: \$4.004↓

Last Year: \$3.761↓

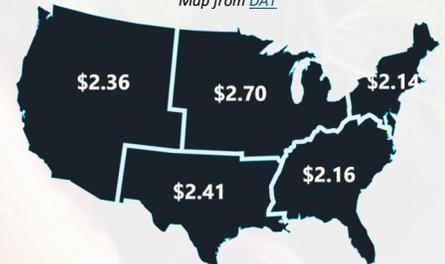
Nat'l Fuel Surcharge: \$0.50

Shortages: Freight rates is flat

- extreme - none
- slight - AZ

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 sunny skies with highs in the mid to upper 60s and lows in the 50s.

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

Yuma, AZ: Partly cloudy and sunny skies with highs in the 80s and lows in the low 50s.

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

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





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



The market is stable and preparing for Easter, with good quality. Production in Mexico is starting to wind down, causing a slight market price increase. Supplies are expected to remain stable through April. Peru will start in May. It's a good time to promote.

avocados



The industry is working to be fully stocked, with only 38 million lbs. projected for week 13. Holy Week has left growers with only a week and a half left, putting pressure on producers to increase days-of-supply across all sizes to avoid service interruptions since many growers take off to celebrate. With Easter falling early this year, there's a gap between Holy Week and Cinco de Mayo, allowing the market to adjust. The size curve remains unknown, and while Mexico has enough fruit for a strong Cinco promotion, promotions should include all sizes or be stronger on bigger fruit.

bananas



The vessels were delayed this week, potentially causing fruit to be one color stage behind in ripening. DCs should communicate any ripening issues prior to delivery. Volumes are strong compared to last week and are expected to return to full strength next week.

beans



Green Beans: Prices are back to normal with steady demand. Supplies continue to improve in Florida and Mexico.

Snow Peas: Guatemalan production is improving, while supplies are steady out of Mexico.

berries



Blackberries: Prices are stable with steady production and with fair quality from Mexico.

Blueberries: Prices are stable and of good quality. Cool, rainy weather has impacted the volume from Oxnard, while Mexico's volume remains steady and Chile's production is increasing.

Raspberries: **ALERT** Prices are up, but they are escalated by tight supplies from Mexico and good quality.

Strawberries: Prices are slightly down with increased volume and good quality from Oxnard and Santa Maria. Florida has steady volume with good quality, while production in Mexico is peaking with only fair quality.

broccoli



Broccoli: Supply is steady and demand is good, with supplies coming from Yuma, Santa Maria, Mexico, and some in Salinas. Signs of brown beads are present. Expect supply and market pricing to be steady for the next few weeks.

Brocolini: **ALERT** Supplies are limited with good demands, and quality is only fair due to previous rain in California and Mexico, causing harvest delays. Supplies are expected to improve in the next few weeks when they transition to Salinas, and market pricing is expected to remain escalated due to limited supplies.



Market UPDATE

brussels sprouts



The supply is better, with fair quality and good demand, despite quality challenges due to previous freezing temperatures. Market prices continue to improve along with supply.

cabbages



The market is expected to remain stable in the coming weeks due to steady supplies and good quality from Oxnard and Yuma.

carrots



New crops are on the horizon, with improved supply and quality going forward.

cauliflower



Supply is steady and demand is good, with supplies coming from Yuma, Santa Maria, Mexico, and some in Salinas. As Yuma winds down, supply is expected to be light, and market prices will rise.

celery



Supply is steady with good quality and improved market pricing from Santa Maria, Oxnard, Yuma, and Mexico.

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 apples.

corn



Prices are down, with improved supplies and quality out of Florida and Mexico.

cucumbers



Prices are down and remain high. Florida production is underway, while Honduras volume is volatile, and Mexico's production is light but expected to increase in the coming weeks.

grapes



Red grapes remain extremely tight on both the east and west coasts, with the west coast still showing lesser availability. Grapes available on the market are showing overall good quality. Import grape volumes are expected to improve slightly next week. If applicable, consider using black grapes instead.

herbs



ALERT (Basil, Chervil & Chives) Rain in the growing region continues to affect supply and quality.

Cilantro: Supplies and quality are good, with improved market pricing from Oxnard and Yuma. Supplies are expected to remain steady.



Market UPDATE

kale



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

lettuce



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

Green & Red Leaf: **ALERT** Supplies are light, but fair quality is reported due to fringe burn and epidermal peel, primarily caused by previous rains and freezing temperatures, causing cosmetic issues and lower yields. The market price is expected to increase in the coming weeks.

Iceberg: **EXTREME** Light supplies and fair quality, with lighter weights and smaller heads. Past freezing temperatures and rains have caused some cosmetic issues, larger cores, and mildew. Supply is expected to be limited in the next three weeks, and markets have increased due to lower yields. Expect increased prices in the next three weeks.

Romaine: **EXTREME** Supplies are light and of fair quality, but early morning frost and freezing temperatures are causing quality issues like fringe burn, blistering, and early epidermal peel. Growers experienced labor delays and cosmetic issues, leading to light supplies and increased market pricing in the next three weeks, affecting the quality of packed products.

Tender Leaf: Supply is steady, with good demand and good to fair quality due to previous rains and freezing temperatures. The supply is expected to improve in the coming weeks with steady market pricing.

melons



Cantaloupe: Size is peaking on 9s and larger with optimal quality and a good flavor profile. Excellent external color and internal quality with solid brix levels of 14-16%.

Honeydew: Guatemalan production continues to arrive with good quality with sizing primarily 5s and larger, with good brix levels, but a drop in Mexico production is causing a shortage on the west coast and increasing prices.

Watermelons: **RADAR** Mexico and offshore markets are strong, but seedless production is insufficient to meet east coast demand, causing a shortage. Honduras production is affected by a virus, and southern Mexico's production slows down due to cooler weather. April volume will increase with Northern Mexico and Florida starting, but the market is expected to remain tight until May.

mushrooms



The weather has improved the quality and supply of brown and white, indicating a steady supply for the next few months. It's a good time to promote.

onions



EXTREME (White) The quality is good in all growing regions, with good demand. Market prices are steady, with white onions being the most volatile. The availability of white onions is extremely scarce, followed by medium red and jumbo yellow. Utah is finishing up, and imported white onions are limited. Europe is offering cash to Mexican growers and buying up all the jumbo white onions, causing supplies in North America to be extremely tight. Vidalias will start April 17th. Imperial Valley is expected to start in the last week of April. This will impact the precut.



Market UPDATE

onions green



Supplies have improved, coming from Mexico. Markets are recovering from past freezing temperatures and rains in Mexico. Supplies are expected to continue to improve.

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 volumes from Florida expected to increase in the coming weeks, while Mexico is forecasting lower volumes by the end of March.

peppers chili



Prices are stable with an upward bias, with supplies primarily coming from Florida and Mexico.

pineapples



The size curve is shifting towards 7ct, while 5ct are getting tighter. Quality continues to be good with high shell colors.

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



ALERT (Yellow Squash) Zucchini and yellow squash prices are down, while yellow squash prices remain elevated. Zucchini squash is currently the best value in the soft squash category, with volumes from Florida and Mexico expected to increase in the coming weeks.

tomatoes



ALERT (Cherry) The tomato market is volatile, with prices down for all tomatoes except cherry, which remain extremely high. Volume is increasing in Florida and Mexico.

commodities alert overview

The produce industry continues to experience quality and yield issues due to weather that caused crop failures, poor product quality, and impacted availability. The annual transition from Arizona's growing season to California has started, which will have an impact on all lettuces, greens, broccoli, cauliflowers, and cabbages. **Arugula** are limited due to cool temperatures and rain. **Raspberries** prices are up due to the cooler weather and low supplies. **Onions White** remain extremely scarce and elevated with no relief until mid-to-end of April, with the recommendation of substituting yellow where applicable. **Oranges** will be limited to smaller sizes due to the weather in California; it is recommended to open spec or switch to apples. **Squash Yellow** is extremely tight until mid-March. **Tomato Cherry** are improving, and prices are starting to drop. It's a good time to promote **Asparagus, Mushrooms** and **Potatoes**.



Market UPDATE

in the news...

PhilaPort welcomes largest vessel in its 300-year history

March 13, 2024 | THE PRODUCE NEWS

The largest vessel in its 300-year history called on PhilaPort’s Packer Avenue Marine Terminal when the 1,300-foot M/V CMA CGM Marco Polo arrived March 8, greeted with a water cannon shower by the Philadelphia Fire Department’s Marine Unit.

The owners of the vessel are the French shipping company, CMA CGM, the third-largest shipping company in the world. CMA CGM’S “NAMEX” service originates in Yantian, China, continuing through Vietnam, Malaysia, Sri Lanka and Morocco before heading to the U.S. East Coast.

“This vessel is the manifestation of years of hard work preparing for this newer class of vessels,” said Jeff Theobald, executive director and CEO of PhilaPort. “It has always been our goal to be able to handle these vessels, which have become the workhorse of maritime trade around the world.”

With a capacity for 16,020 containers, the Marco Polo is 180 longer than Philadelphia’s tallest building, the Comcast Technology Tower. Marco Polo’s length is more than four football fields and would span 2.6 Philadelphia blocks.

“We are thrilled to finally bring a vessel of this size up the Delaware River,” said Captain David Cuff, president of the Pilots Association of the Bay, and River Delaware. “We always knew that we could pilot this size of ship up the Delaware River – safety was and is the highest priority. To be sure it could transit safely, a dozen of our most experienced pilots spent valuable hours training in the simulator at MITAGS (Maritime Institute of Technology and Graduate Studies).”

The cargo being transported by vessel to the port consists of fruit and vegetables, such as clementines from Morocco. Typically, food products valued at over \$5 billion move up the



Delaware River per year.

The Port of Philadelphia has experienced a container growth of 74 percent since 2015. Vessels like the M/V CMA CGM Marco Polo, which call at The Port of Philadelphia, can generate up to 565 direct and indirect jobs and \$5 million in state and local taxes. PhilaPort is one of the most important economic engines in Southeast Pennsylvania, generating approximately 12,020 direct and indirect jobs.

[Read full article HERE](#)

produce in **PEAK** *for March*

Asparagus	Cabbage	Pears
Avocado	Carrots	Potatoes
Broccoli	Oranges	Turnips



Market UPDATE

Transition Schedules - Spring - Salinas Season - 2024

Grower / Shipper	Current Location	Transitioning	Commodity	Transition Dates	Transition Dates	Region
Bengard Ranches	Yuma, AZ	Salinas, CA	Broccoli Crowns	03/05/24		
Bengard Ranches	Yuma, AZ	Salinas, CA	Cauliflower	03/05/24		
Bengard Ranches	Yuma, AZ	Huron, CA	Lettuce Iceberg	03/18/24	04/15/24	Salinas CA
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/01/24		
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/01/24		
Bengard Ranches	Yuma, AZ	Oxnard, CA	Celery	06/15/24	03/30/24	Oxnard
Church Brothers	Yuma, AZ	Salinas, CA	Broccoli Crowns	03/15/24		
Church Brothers	Yuma, AZ	Salinas, CA	Cauliflower	03/15/24		
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Iceberg	04/15/24		
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/01/24		
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/22/24		
Church Brothers	Yuma, AZ	Salinas, CA	Celery	06/03/24		
Church Brothers	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/15/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Broccoli Crowns	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Cauliflower	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Iceberg	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Green Leaf / Red Leaf	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Romaine	03/25/24		
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Value Added / Processing Plant	03/25/24		
Green Gate Fresh	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/22/24		
River Fresh Farms	Yuma, AZ	Salinas, CA	Broccoli Crowns	03/25/24		
River Fresh Farms	Yuma, AZ	Salinas, CA	Cauliflower	03/25/24		
River Fresh Farms	Yuma, AZ	Huron, CA	Lettuce Iceberg	03/18/24	04/15/24	Salinas CA
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/01/24		
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/01/24		
River Fresh Farms	Yuma, AZ	Salinas, CA	Celery	06/15/24		
Taylor Farms - CA	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/15/24	Updated	
The Salad Farm	Yuma, AZ	Hollister, CA	Value Added / Processing Plant	04/01/24		

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

