

Market **OUTLOOK**

Week 44: October 28 - November 3, 2024



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Market **ALERT**

Asparagus
Beans
Berries
Broccoli
Cabbage
Citrus
Corn
Grapes
Herbs
Melons
Mushrooms
Pears
Tomatoes

transportation

Nat'l Diesel Avg: \$3.553↓

Last Year: \$2.561↓

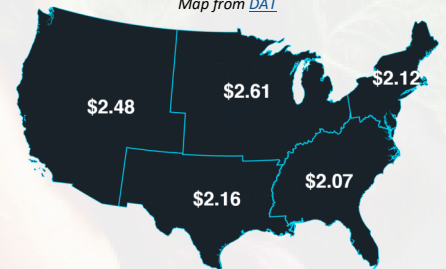
Nat'l Fuel Surcharge: \$0.46

Shortages: Freight rates is flat

- extreme - none
- slight - none

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 60s and lows in the 50s.

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

Yuma, AZ: Sunny with highs in the 80s to 70s and lows in the 50s.

Immokalee, FL: Cloudy and sunny skies with highs in the 80s and lows in the 70s.

Idaho Falls, ID: Cloudy and sunny skies with highs in the 40s and lows in the 20s.



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Market UPDATE

apples



Washington's 2024 crop is expected to be outstanding quality due to favorable growing conditions. The forecasted crop is 124 million, down 136 million. However, red delicious, gold delicious, granny smith, gala, and fuji have decreased. Cosmic has increase, with 2.8 million boxes. As Washington faces a 12 million box deficit, prices are expected to rise. Despite this, there is still ample fruit to ship year-round.

asparagus



Supplies are improving on both coasts. Peruvian production is increasing and quality is rising, with good availability expected in November. However, Thanksgiving is likely to increase demand and prices, resulting in limited white availability for 3-4 weeks.

avocados



Mexico supplies the US with 95.5% of its supply, with a rise in growers registering acreage for harvest. The Aventajada crop, dominated by small fruit, is expected to have a similar size curve. Promotable volume and pricing are expected for 60s and smaller, while 48s and larger with leaner supply are likely to hold value. As the crop progresses into the Mail/Normal crop, a more balanced size curve is expected. Lenticel, or black/dark spotting, may appear after rain in Mexico, but it is cosmetic and will not affect the fruit's internals. Lenticel typically bursts after some time off the tree and while fruit is in transit, dissipating when the fruit ripens.

bananas



The fruit is exhibiting excellent overall quality with consistent and solid volumes.

beans



Green Beans: Prices are escalated. Recent storms in North Carolina and Florida have limited supplies, leading to increased prices. Supply may stabilize next week, but a significant decline is expected from November to December.

Snow Peas: The prices are up. Light availability is limited during the Peru-Guatemala transition, with relief expected in 10-15 days.

berries



Blackberries: **RADAR** Prices remain stable. In Mexico, quality is fair, and volume is improving, with steady supply expected for the rest of the year. Quality is fair in Watsonville, but issues like attached calyx, red cell regression, and smaller fruit persist. Overall, production volume has decreased, reaching a seasonal low.

Blueberries: **ALERT** The Pacific Northwest has ended, causing a significant supply gap. Currently, it relies on imports from Peru, Chile, and Mexico. Supply is expected to reach its lowest point, then stabilize in mid-November. This leads to shortages in October, causing rising and active markets.

Raspberries: **RADAR** Prices remain stable. In Mexico, the quality is excellent, with a vibrant red color and promising sizes. While in Watsonville, the quality is good, with a rich dark red color due to warm temperatures and an average medium size. Overall, the production has increased for the final time before the season ends.

Strawberries: Prices are stable. Santa Maria's quality is inconsistent with overripe ones, and production is decreasing as ranches enter post-peak stages. Watsonville/Salinas produces good quality fruits with sheen, small-to-medium size, strong red color, and good flavor. Florida's production is delayed by a few weeks.



Market UPDATE

broccoli



Broccoli: Supply and demand have improved, with supplies coming from Salinas, Santa Maria, and Mexico. Market pricing has also improved, but contract pricing will not be escalated.

Broccolini: The market has experienced a shift in pricing, resulting in short supplies and a fair quality situation, despite the short supply.

brussels sprouts



The supply is on budget, quality and market pricing have improved, with good demand. Supplies are now coming from Salinas, and markets are expected to remain steady for the next few weeks.

cabbages



Supplies are light. Growers are reporting field-level challenges and fair quality, with products coming from Oxnard and Salinas. Growers are experiencing quality issues due to insect damage, and market prices have increased this week, causing light supplies in the coming weeks.

carrots



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

cauliflower



The supply is light and demand is increasing, with supplies coming from Salinas and Santa Maria, with some from Mexico. Quality is fair, and lighter supplies are expected in the coming weeks, with market pricing expected to increase.

celery



Supply is expected to remain steady, with current supplies coming from Santa Maria and Salinas. Quality is reported as good, and market pricing is expected to increase as the item becomes popular during the holidays.

citrus



Limes: The market is at a low point, with small to midsized fruit peaking. Supply of 175's is increasing, and overall fruit health has improved. Upcoming rain in Veracruz is expected to boost crop size.

Lemons: Pricing is steady. District 3 is packing steady volumes with good quality.

Oranges: **ALERT** California harvests have started, with high prices and limited capacity. Small fruit is expected to be heavier, with good quality, and supplies are expected to increase in November.

corn



High pricing and limited availability on the east coast are expected due to Helene damage, while supply in the east is light, waiting for new growing areas to ramp up production.

cucumbers



With northern cucumber supplies diminished, the east has limited supplies from North Carolina, Georgia, and South Florida, with reduced acreage and quality issues in Georgia post-Hurricane Helene. The west coast has moderate supplies, with Baja offering the best quality, while Central Mexico shows some scarring. Improvements are expected with cooler weather.



Market UPDATE

grapes



The prices are slightly up. California's early finish due to weather conditions will significantly impact reds in early October, making supplies in October and November challenging.

herbs



Sage: **ALERT** Limited for the next week or so due to rain in Mexico affecting its quality and supply.

Cilantro: Supply is improving with fair quality. Demand has increased, with supplies shipping out of Oxnard and Salinas. Supply is expected to be limited for the next few weeks with improved market pricing.

kale



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

lettuce



Green & Red Leaf: The supply is good with increased demand. The sizing is normal, the weights are good, and the quality is fair, with fringe burn due to a recent heat wave experienced by Salinas.

Iceberg: The supply is good and the quality is fair. Demand has increased, but the Salinas Valley heat wave is causing lighter weights and sizing changes. Harvest in Huron is starting, with better supply than Salinas, leading to higher demand causing market price increases, with expected higher prices in the coming weeks.

Romaine: Supplies are on budget, with fair quality. Good demand, with supplies coming from Salinas and Santa Maria. Excess heatwave in Salinas is expected to affect supplies, causing fringe burn on outer leaves and quality issues.

Market pricing is also expected to increase.

Tender Leaf: The supply is expected to be steady, with good to fair quality and good demand from Salinas and Watsonville.

melons



Cantaloupe: **RADAR** Prices are slightly up. California production has ended, and the Yuma fall program is starting, expected to last three to four weeks before the first offshore arrival in Florida. Harvest in Yuma is slow, with sizing peaking at 12s and limited 9s, and jumbo fruit absent. High winds cause skin dirt, but quality is strong with good internal attributes, featuring 10-14% Brix levels. Seasonal conditions lead to smaller sizes and greener fruit.

Honeydew: **RADAR** Prices are stable. The harvest mostly consists of 5/5J, with a few smaller ones. Aside from some external scarring caused by wind, the overall quality has been good, with brix levels typically ranging from 12 to 14%.

mushrooms



Quality is good, but yields are fluctuating during the summer. Limited availability is expected for the next few weeks, and no price increases are expected. End users can be less affected by using a combination of white and brown mushrooms.

onions



The quality of crops is good across all regions, with steady demand and market pricing. Overall volumes are up compared to last year, with onions mostly stored. Red markets are strong, with availability in all colors except medium reds, yellows, and whites. Mexico is buying a lot of whites and reds at this time.



Market UPDATE

onions green



Mexico's supply has improved due to increased demand and improved yields, while market pricing has declined, and the market is expected to remain stable for a few weeks.

pears



RADAR The Northwest crop in WA/OR has decrease in volume due weater in late February/ March. Bartlett are down by 14%, affecting the grade and size. Anjous are down by 30%, with more fancy and a 3rd grade packed, expected to finish in May/June. Red anjous are down 7%, with 120/135ct being questionable and availability early November through May. Bosc is down 63%, making it difficult to determine the end date, but expected to start winding down at the end of January to mid-February. The market pricing is expected to be escalated all season.

peppers bell



Michigan freezes and Georgia storm impacts have tightened supply, with Florida pending damage assessments. California supplies are light, while Mexico's significant volumes are expected in mid-late November. Canada's colored bell volumes remain adequate, while Central Mexico maintains steady supply.

peppers chili



Eastern supplies are limited due to local programs and Michigan's season ending. Georgia will begin production soon, and South Florida's mainline chilies are expected shortly. In the west, jalapeños are abundant, with moderate availability of other varieties. Baja supplies are winding down, with fair quality on some varieties. Nogales will come online soon, and we should see improved quality quickly.

pineapples



Supplies are tight, so flexibility in size is advised. Larger fruit are slowly increasing, with a gradual increase week over week. Fruit is still tight, but the size is expected to improve.

potatoes



The Idaho market pricing is down, with good quality. Yields are down by 2.7%. Despite the decrease, Idaho is expected to continue to have plentiful availability. Harvest is wrapping up for the season. Good time to promote.

squash



The pricing remains steady, with adequate supply in the east, but quality issues impact availability. Eastern North Carolina is finishing up, and we will be relying on Georgia and Florida for supplies. California's production is now in Sonora, with consistent volumes and good quality.

tomatoes



Grape prices are up in the east due to light supply, while roma and rounds remain high. Florida has limited supply while Virigina is done. Baja and Central/Eastern Mexico provide moderate supplies, with new areas starting soon. Eastern/Central Mexico is expected to maintain moderate volumes, with fluctuations common this season. Quincy will start soon. Roma is nonexistent and rounds are light in the east. Florida's production is being assessed, resulting in light supply and quality concerns. California is wrapping up, Baja transitions to fall crop, and Central/Eastern Mexico has a light supply of roma.

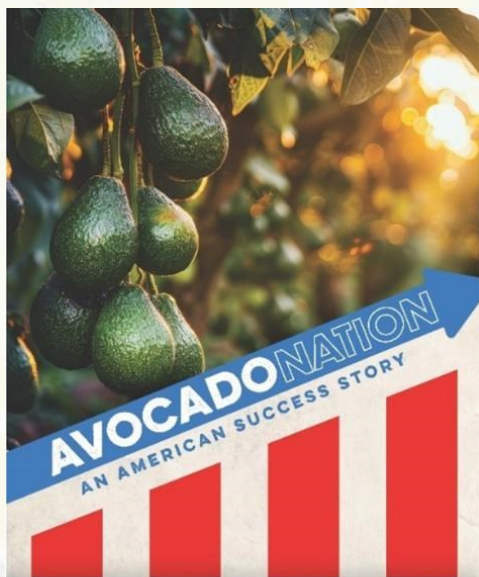


Market UPDATE

in the news...

Film highlights how avocado success benefits California communities

By [Jill Dutton](#) October 22, 2024 | [thepacker.com](#)



The film focuses on the impact and value of strategic promotion. (Photo courtesy of the Hass Avocado Board)

A new film about the avocado industry's success at driving demand nationwide documents the local as well as global impact of the marketing program led by the Hass Avocado Board since its inception over 20 years ago, according to a news release.

HAB said independent researchers from the University of California, Davis, found strategic promotion helped drive over 260% growth of U.S. avocado consumption while all fresh fruit consumption only rose by 9% during the same time frame. Growers in California and the surrounding communities that benefit from the

business activity have a lot to celebrate as researchers found evidence that with continued investment in research and marketing, the industry is poised for even more growth, the release said.

HAB said there has been tremendous amounts of hard work and collaboration across the industry to transform avocados from being a misunderstood specialty fruit to today's produce aisle powerhouse. "Avocado Nation: An American Success Story," now streaming, looks at how the business opportunity for growers, including over 3,000 avocado producers in California, has transformed since the Hass Avocado Promotion, Research and Information Order created the HAB in 2002.

Feedback underscores the impact, the company said, for example:

"My family has been growing avocados for multiple generations," Chuck Bandy, a southern California producer for more than 35 years, said in the release. "I appreciate that because HAB takes care of keeping demand high through promotion, I can focus on being hands-on in the groves doing my part to add value and security for my family and community."

"Mother Nature serves up plenty of curve balls to California growers," Bob Schaar, HAB chairman and Southern California grower for over 25 years who had to replant his avocado grove after a fire destroyed it in 2007, said in the release. "HAB's continued success at using our incredible nutrition story to

drive sales without having to discount fuels my excitement and confidence in the future, so I keep charging ahead with a positive outlook."

"There are hundreds of people involved behind the scenes of California's avocado industry," Scott Bauwens, a Northern California grower and 23-year operations veteran, said in the release. "We all count on each other and HAB to keep profits up so there's a lot to be proud of when I see in the report that we achieved an ROI of 247% over the last two decades."

HAB said that without the its and the member organizations' ongoing support to grow consumption, the U.S. avocado industry might have faced diminished demand, increased supplies and lower prices for producers and importers. Stakeholders across the supply chain can learn more about how HAB's efforts have a positive effect on the whole industry and view the film at HassAvocadoBoard.com/HAPRIOImpact.

[Read full article HERE](#)

Watch the documentary:

<https://www.youtube.com/watch?v=wBF-DUCJ78>



Market UPDATE

Transition Schedules - Fall 2024

Grower / Shipper	Current Location	Transitioning	Commodity	Transition Dates
Bengard Ranches	Salinas, CA	Yuma, Az	Broccoli Crowns	11/25/24
Bengard Ranches	Salinas, CA	Yuma, Az	Cauliflower	11/29/24
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Iceberg	11/14/24
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/14/24
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Romaine	11/14/24
Bengard Ranches	Salinas, CA	Oxnard, Ca	Celery	12/02/24
Church Brothers	Salinas, CA	Yuma, Az	Broccoli Crowns	11/20/24
Church Brothers	Salinas, CA	Yuma, Az	Cauliflower	11/25/24
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Iceberg	11/04/24
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/25/24
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Romaine	11/04/24
Church Brothers	Salinas, CA	Yuma, Az	Celery	11/04/24
Church Brothers	Salinas, CA	Yuma, Az	Value Added / Processing Plant	11/18/24
Field Fresh Farms	Watsonville, CA	Yuma, Az	Broccoli Crowns	11/11/24
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Iceberg	11/11/24
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/11/24
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Romaine	11/11/24
Field Fresh Farms	Watsonville, CA	Yuma, Az	Value Added / Processing Plant	11/11/24
Green Gate Fresh	Salinas, CA	Yuma, Az	Value Added / Processing Plant	11/11/24
River Fresh Farms	Salinas, CA	Yuma, Az	Broccoli Crowns	11/25/24
River Fresh Farms	Salinas, CA	Yuma, Az	Cauliflower	11/29/24
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Iceberg	11/14/24
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/14/24
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Romaine	11/14/24
River Fresh Farms	Salinas, CA	Oxnard, Ca	Celery	12/05/24
River Fresh Farms	Salinas, CA	Yuma, Az	Tender Leaf/Value Added	11/14/24
Taylor Farms - CA	Salinas, CA	Yuma, Az	Value Added / Processing Plant	11/18/24
The Salad Farm	Hollister, CA	Yuma, Az	Value Added / Processing Plant	11/18/24

Huron, Ca. 10/16/24

Huron, Ca. 10/14/24

Huron, Ca. 10/16/24

Huron, Ca. 10/16/24

Huron, Ca. 10/16/24

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

