

Market OUTLOOK

Week 45: November 4 - 10, 2024



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Market ALERT

Beans
Berries
Broccoli
Cabbage
Cauliflower
Citrus
Corn
Cucumbers
Grapes
Herbs
Lettuces
Melons
Mushrooms
Pears
Peppers Bell
Tomatoes

transportation

Nat'l Diesel Avg: \$3.573↑

Last Year: \$2.692↓

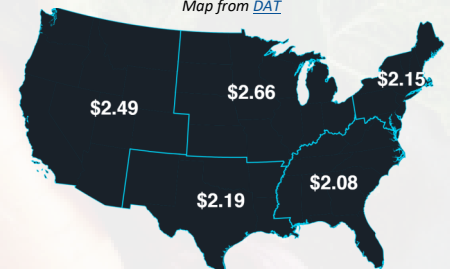
Nat'l Fuel Surcharge: \$0.42

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 70s and lows in the 50s.

Salinas, CA: Partly cloudy and sunny skies with highs in the 70s and lows in the 40s.

Yuma, AZ: Sunny and partly cloudy with highs in the 70s and lows in the 50s.

Immokalee, FL: Partly cloudy and showers with highs in the 80s and lows in the 70s with PM thunderstorms on Wednesday.

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



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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



Volume and pricing are expected to remain steady, with increased supply from Baja. Quality remains fair due to heat in the region. Peruvian volume is increasing and will continue for the next four to five weeks, particularly for larger sizes. Market activity is lower as production improves. Demand and pricing are expected to increase in mid-November ahead of Thanksgiving, while white asparagus will remain limited until early December.

avocados



Mexico is expected to dominate the market in the coming months, with Colombia, Chile, and the Dominican Republic also offering opportunities. Volumes will be strong through the Super Bowl, and increased promotional activity is encouraged. The Aventajada crop size curve will favor 60s and smaller into December, with a more "normal" peaking on 48s expected by late December. Storage temperature recommendations are 42°F.

bananas



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

beans



Green Beans: Prices remain escalated. Storms in Florida and Georgia are expected to cause low supplies next month, leading to potential price increases, with a decline in supplies expected from November to early December.

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

berries



Blackberries: **RADAR** Prices are down. 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** Prices are escalated due to very limited quantities. The Pacific Northwest season has ended, leaving a significant gap in domestic and imported crops. The current supply is limited, relying on imports from Peru, Chile, and Mexico. Supply is expected to reach its lowest point in mid to late October, then increase and stabilize around mid-November.

Raspberries: **RADAR** Prices are slightly up. 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 slightly up. Santa Maria and Watsonville/Salinas have good quality but are declining, with Santa Maria expected to drop significantly by late November and Watsonville/Salinas possibly ending by early November.



Market UPDATE

berries cont...



Florida's production is delayed by 3 weeks due to Hurricane Milton, while Mexico's production is starting with small quantities expected to increase in 2-3 weeks. The quality is good, with some green tips and small to medium sizes.

broccoli



Broccoli: The market is expected to be volatile, with limited supplies and a transition for broccoli crowns to Yuma expected between November 20 -24th. Mexico may provide supplies, and current pricing and contracts are expected to escalate.

Broccolini: Supply shortages with good demand and fair quality. Limited supplies will persist until the Yuma transition. Fair quality is reported, and market pricing has reacted, causing limited supplies and increased prices.

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



Demand has increased, with light supplies coming from Salinas and Santa Maria, with some from Mexico. Quality is fair. Lighter supplies are expected in the next few weeks until the transition to Yuma is complete, and market pricing will be escalated for most contracts.

celery



Supply is expected to remain steady, with current supplies coming from Santa Maria and Salinas. Quality is good, and market pricing is expected to increase due to limited supply and increased popularity during holidays.

citrus



Limes: Prices are low, with mid-to-large sizes peaking and improved fruit health. Small fruit will be scarce through November due to recent rains that have helped size up fruit.

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

Oranges: **ALERT** Pricing is high. California has begun harvesting, albeit in a limited capacity. Sizing is expected to be heavier for small fruit, with good quality being reported. Supplies will ramp up as we move into November.

corn



Pricing is high, with limited availability on the East Coast. The effects of damage from Helene will continue to be felt in the coming weeks. Supply in the west is light, waiting on new growing areas to ramp up production.

cucumbers



Pricing is high as east coast growers began to call



Market UPDATE

cucumbers cont...



Act of God. North Carolina crops have ended. Georgia's availability is down due to Hurricane Helene's impact on crops. South Florida has limited volume, with quality challenges expected for the next month and a half due to Hurricane Milton. Mexico is supplying moderate volumes, with better quality from Baja and Central Mexico, while Sonora's quality is only fair.

grapes



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

herbs



Dill & Sage: ALERT Limited supplies 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 on budget, with demand increasing. Sizing is expected to be normal, with good weights. Quality is fair, with some seeder presence due to previous warm weather in Salinas. As the transition to Yuma occurs, supplies will become slightly limited.

Iceberg: Light supply and of fair quality, but increased demand is affecting sizing and supplies. Harvest in Huron has begun, with a Yuma transition during November 11-14th. Higher demand is causing market price increases.

Romaine: Supplies are light, with fair quality and good demand causing market price increases. Supplies are coming from Salinas and Santa Maria. Excess heatwave in Salinas is expected to have cosmetic defects and abnormal sizing. Market price increases are expected until transitioning to Yuma during November 11-14th.

Tender Leaf: Steady supplies with good to fair quality and good demand from Salinas and Watsonville. Quality and supplies are expected to be steady.

melons



Cantaloupe: RADAR Prices are up due to California ending and Yuma starting. Yuma has decent volumes, but mostly 12/15s with limited 9s. Some quality issues are due to mud staining caused by wind and morning dew, but new fields and the packers cleaning the melons have improved quality significantly. Sizing issues will continue for the next 3 weeks, normal for this time of year, leading to extremely limited 9s.

Honeydew: Prices are stable. The harvest mostly consists of larger sizes, including jumbo. A better variety is expected by next week. 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. Better availability, and no price increases are expected. End users can be less affected by using a combination of white and brown mushrooms.



Market UPDATE

onions



The quality is good across all growing regions, with steady demand and market pricing. Overall volumes are up compared to last year. The majority of the growers have their onions in storage. Markets on reds are strong. There's plenty of availability on all colors and sizes, with the exception of medium reds, yellows, and whites. Mexico is buying a lot of whites and reds.

onions green



Mexico supplies have improved, with increased demand and improved yields reported by growers. Market pricing has also improved, with a decline in both contract and initial pricing, 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 weather 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



Pricing is high as east coast growers began to call Act of God. Color bell production is currently concentrated in Jalisco, with Canadian supplies winding down; while supply remains adequate, it is lighter than in recent weeks. Sizing is consistent, and quality is fair. Green bell

availability is limited due to northern regions wrapping up and weather impacts from Hurricane Milton in Georgia and Florida, leading to increased quality issues. Though Oxnard and Fresno have peppers, light acreage in Coachella won't meet national demand, with significant volumes expected from Sinaloa in December.

peppers chili



Supply is very limited in the east, with light volumes from Georgia and low expectations from Plant City due to Hurricane Milton. In the west, Baja and Central Mexico provide better availability, particularly for jalapeños, while habaneros are in short supply.

pineapples



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

potatoes



The Idaho market pricing is steady, with good quality. Yields are slightly down from last year. Despite the decrease, Idaho is expected to continue to have plentiful availability. Harvesting is wrapping up for the season in the next two weeks. Good time to promote.

squash



Price is steady. Yellow and zucchini squash availability is consistent in the east, with continued harvesting in North Carolina and steady supplies from Georgia and Florida. In the west, moderate to good supplies come from Sonora, with high quality. Overall, supply and quality are expected to remain stable.



Market UPDATE

tomatoes



Pricing is high, as several east coast growers call Act of God. Roma tomato supply is limited in Quincy and South Georgia due to Hurricane Helene, with quality concerns and reduced yields. The shift to Ruskin/Palmetto is hampered by Hurricane Milton's damage. Round tomatoes face similar issues, with significant reductions in South

Georgia and Florida, also impacted by recent hurricanes. In the west, California's season is ending, and Mexican supply remains low until late December. Florida's grape tomato supply is affected by hurricanes, prompting quality monitoring, while Baja and Central Mexico contribute moderate volumes, with overall quality rated fair to good despite challenges.

in the news...

Harvest going well for Idaho grower-shippers

By **TOM KARST** November 1, 2024 | thepacker.com

All systems were go for Idaho potato grower-shippers in October.

Potato harvest in Idaho was 69% completed as of Oct. 6, close to the 66% completed at the same time last year and the 65% completed for the five-year average.

Overall U.S. potato acreage in 2024 is down slightly from 2023, according to the USDA. This year, the U.S. is forecast to plant 2% fewer acres than in 2023.

At 941,000 acres, the 2024 U.S. potato planted acreage forecast is a 24,000-acre reduction from 2023 but is 18,000 acres more than the 2020-22 average.

The USDA said decreases in acreage were most pronounced in the Pacific Northwest, which typically accounts for 60% of the domestic crop. Washington (down 10,000 acres), Idaho (down 5,000 acres) and Oregon (down 3,000 acres) are expected to have the largest downward year-over-year adjustments as processors reduce contracted acreage, the USDA said.

In 2023, the USDA reported Idaho planted 330,000 acres of potatoes.

Potato acreage reductions are also expected in seven of the 10 other USDA-surveyed states, likely reflecting higher late-season storage volumes and softer open-market prices during the September 2023 to August 2024 potato marketing year.

The USDA estimates that 934,200 acres of the 941,000 planted U.S. acres will be harvested based on average abandonment rates.

"If this estimate is realized and the U.S. average yield is close to the trendline (458 [hundredweight] per acre), total potato production would be 3% lower (12.9 million [hundredweight]) than last season, but 4% higher than the 2020-22 production average," the USDA said.

Average yields in 2020-22 fell below trend largely due to weather-related issues in Idaho and Washington. USDA will release its preliminary 2024 U.S. and state-level potato yield and production volume in the November Crop Production report, which will include updated acreage estimates.



At 941,000 acres, the 2024 U.S. potato planted acreage forecast is a 24,000-acre reduction from 2023 but is 18,000 acres more than the 2020-22 average, according to the USDA. (Photo: Lightfield Studios, Adobe Stock)

PRICE DIRECTION

Following a large fall harvest in 2023, fresh potato prices fell sharply below prices observed during the previous 16 months. The USDA reported monthly grower prices for fresh potatoes ranged from \$10.20 to \$10.60 per hundredweight between January and May 2024, compared with \$21.20 to \$23 per hundredweight...

[Read full article HERE](#)



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

